SunflowerEnterprise

Sunflower Enterprise 4.5

User Guide

Version 4.5

Sunflower Systems

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PREFACE

The Sunflower Enterprise™ Administration Guide is your manual to understanding the administration setup, features and functionality provided by the Sunflower Enterprise Administration module. This guide provides insight, overviews and instructions incorporated into the Sunflower Enterprise Administration module.

This guide includes the following chapters:

- “Overview”
- “Roles”
- “User Interface”
- “Core Assets”
- “Get Help”

ABOUT THIS GUIDE

The *Sunflower Enterprise User Guide* is an introduction to common features and functionality available for the Sunflower Enterprise product suite. This guide is intended to be a comprehensive guide for the Sunflower Enterprise product suite offering.

INTENDED AUDIENCE

This guide is written for multiple audiences with different roles that support and use the Sunflower Enterprise product suite.

ADMINISTRATORS

This guide provides administrators who are responsible for maintaining and configuring Sunflower applications with illustrations and discussions that address key features and setup procedures for Sunflower applications. This guide assumes that you have knowledge of your operating system and the relational database that supports your environment.

FUNCTIONAL USERS

This guide provides functional users who are responsible for asset management and reporting accountable property the knowledge to setup and work with Sunflower applications.

DOCUMENT CONVENTIONS

This guide uses the following formatting conventions:

STYLE	MEANING
Bold	Field Term, Menu Name or Screen Name.
Field Value	Input Value or List Of Values.
Emphasis	Emphasized subject.
NOTE:	Provides additional facts.
Warning:	Issues a warning to the reader.
Tips:	Provides users with helpful tip.

1

Overview

Sunflower Enterprise™, the Sunflower Systems Lifecycle Asset Management product suite solution, enables organizations to track and manage every enterprise asset from the time funds are obligated, until the asset is retired at the end of its useful life. The Sunflower Enterprise product suite captures every status change, including financial transactions, maintenance records and more, all within the core Sunflower asset repository. Sunflower enables your enterprise to establish a holistic representation of the assets owned by your organization so that you can view and assess the utilization and total cost of ownership of your assets; all from a comprehensive source of data and analysis that stems from each stage of the asset lifecycle.

Key Concepts

This chapter includes the following discussion points and concepts:

- "Introduction"
- "The Sunflower Enterprise Product Suite"
- "Lifecycle Asset Management"

INTRODUCTION

Each enterprise has unique requirements and business practices for effective asset management. The Sunflower Enterprise product suite significantly improves asset management processes across a wide spectrum of enterprises by establishing a cradle-to-grave process for managing, controlling and accounting for all assets within your organization. As a result, Sunflower applications provide a complete and actionable view of your entire asset base. The Sunflower repository provides an accurate and actionable source of data that enables organizations to manage their valuable asset base. This asset base can include capital equipment, sensitive and/or hazardous materials, proprietary tooling and machined parts, uniforms and media that contains highly sensitive information.

The Sunflower Enterprise product suite provides the following benefits:

- A single repository of data for strategic purposes including portfolio management, return on assets and predictive analysis
- Adds relevance and context to previously-disjointed processes and systems, enabling total asset visibility and intelligence
- Provides a framework to enable administrative compliance with all current and future regulations including Sarbanes-Oxley / A-123 OMB Memo, Basel II, SAS 70, HIPAA and other process-driven rules

Regardless of an organization's policies and procedures which distinguish it from other organizations, the Sunflower Enterprise product suite can support unique business practices with its multi-layered architecture, consisting of the following:

- Core Data Layer
- Logic Layer
- User Interface (UI) Layer

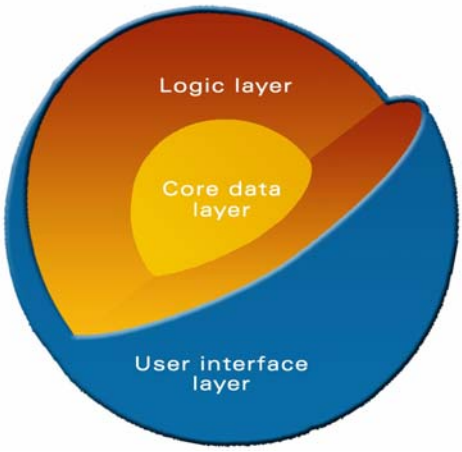


Figure 1-1: Sunflower Application Architecture

The **Core Data** Layer is the center of the Sunflower application architecture. It contains the tables and views that the Oracle database uses to store all application data. Sunflower uses the **Core Data** Layer to configure and capture general asset and user-defined data to collect and consolidate data from other enterprise systems and data items that are unique to each organization. Moving outward, the **Logic** Layer enables you to insert, update and delete data, configure business processes and extend application behavior. Lastly, the **User Interface** (UI) Layer provides the connection between the user and the **Logic** Layer. You use the Sunflower UI to manage the day-to-day events and transactions that affect your assets. The UI component enables you to configure and meet your specific business requirements while maintaining the integrity of the core application.

SUPPORT FOR ORACLE 10G

There are three primary technology components that comprise the Sunflower application system:

- **ORACLE Relational Database Management System (RDBMS)** - Provides the tables, views of the Data Layer and the packages and APIs of the Business Logic Layer
- **Oracle Application Server** - Provides the UI for Forms and Reports
- **Browser** - Provides the interface within the UI Layer

Sunflower supports the latest release of Oracle's application and database servers, Oracle 10g.

	SUPPORTED PLATFORMS FOR SUNFLOWER
RDBMS	ORACLE 9.2.0.x and 10g
Application Server	9iAS Release -1.0.2.2.x, 9.0.2 and 10g (9.0.4)

BENEFITS: SUNFLOWER UPGRADE

While Oracle has many versions of database and application server software, Sunflower does not require separate source code for each version. A single version runs on all supported versions of Oracle's database and application server. This means that you have fewer integration and upgrade issues when running Sunflower on your Oracle database and application server.

ADDITIONAL DOCUMENTATION

Visit the Sunflower Systems Customer Care Website at http://www.sunflowersystems.com/ccare/ and download the latest guides for all Sunflower products and product-related services and news.

THE SUNFLOWER ENTERPRISE PRODUCT SUITE

The Sunflower Enterprise product suite consist of the following:

- Sunflower Assets
- Sunflower Express (TBD)
- Sunflower Sentry
- Sunflower Contract Reports
- Sunflower MobileTrak
- Sunflower PackTrak
- Sunflower ExcessTrak

SUNFLOWER ASSETS (PRODUCT OVERVIEW)

Sunflower Assets® provides clarity to disjointed asset management processes by supplying a single system of record for all assets across the enterprise as they progress through their lifecycle from acquisition to disposal.

Sunflower Assets benefits include:

- Better control of existing assets and informed decisions about future purchases
- Data structure that improves asset utilization
- Provide timely information to aid in compliance of regulations
- Confidently adhere to asset control and accountability requirements

SUNFLOWER EXPRESS (PRODUCT OVERVIEW)

Similarly, Sunflower Express is a condensed version of Sunflower Assets which includes the same modules except the Finance, Inactive or IT Components modules. Additionally, the database included with Sunflower Assets Express can manage up to 7,500 assets. The Sunflower Assets database can manage an unlimited number of assets.

Sunflower Express includes the following modules: Agreements, Management, Excess, Review and Administration.

SUNFLOWER SENTRY (PRODUCT OVERVIEW)

Sunflower Sentry™ enables organizations to manage short-term transfers of controlled assets to authorized individuals. Sunflower Sentry enables the check-in and check-out of assets such as electronic media, documents, parts, specialized tools, safes and keys or other items that your organization may want to issue temporarily to authorized individuals. In addition, Sunflower Sentry enables you complete internal and external transfers of assets and to issue reports on asset activity.

Sunflower Sentry benefits include:

- Confidently manage the asset loan process
- Know where any loaned asset is at any point in time
- Check-out specified assets only to authorized individuals
- Provide up-to-the-minute information for audit and security purposes

Additional features that Sunflower Sentry provides is the ability to keep external transfers open until your business process determines that the transferred assets are in the control of an authorized organization and point of contact. This feature provides the ability to manually create asset final events when closing Sunflower Sentry external transfers thus enabling you to report on all open external transfers.

SUNFLOWER CONTRACT REPORTS (PRODUCT OVERVIEW)

Sunflower Contract Reports™ gives you the power to quickly and easily generate, modify and archive Agency-specific property financial reports based on all of the asset records contained in the Sunflower repository. Each asset transaction that you capture throughout the fiscal reporting period is accumulated and ready for reporting according to the specific requirements of the Department of Defense and NASA reports. Sunflower Contract Reports eliminates the need to generate multiple ad-hoc reports from multiple systems to assemble and supply the details of these highly specific financial reports. Sunflower Contract Reports enables you to generate reports for a specific contract and reporting period that can then be sent to the respective point of contact for each agency.

Sunflower Contract Reports benefits include:

- Eliminate manual reconciliation of redundant data coming from multiple sources
- Faster production of required contractual information
- Substantial decrease in input errors
- Automatically archive a historical record for audit and future review
- Automatically upload asset information to newly-mandated DOD UID Registry
- Mitigates risk during mandated audits
- Report data is automatically updated to reflect the latest transactions each time the reports are generated, eliminating the need for manual data entry

SUNFLOWER MOBILETRAK (PRODUCT OVERVIEW)

Sunflower MobileTrak™ improves and simplifies the physical inventory process by integrating Sunflower Assets® with a mobile computing solutions. MobileTrak meets the needs of enterprises that track and manage assets using various types of data collection methods. MobileTrak makes it easy for people in the field to record and deliver inventory data back to the Sunflower Assets repository.

Sunflower MobileTrak benefits include:

- Simplified scanning and data verification of assets during physical inventories for optimum audit results
- Immediate notification of asset status, asset additions, changes or deletions
- Accurately captures asset movement and updates
- Transfer multiple assets in one action

SUNFLOWER PACKTRAK (PRODUCT OVERVIEW)

Sunflower PackTrak™ expedites bulk tracking assets through the packing, shipping and receiving process as they move from one location to another. PackTrak quickly and accurately captures changes for responsible parties in addition to asset condition data during packing, shipping and receiving.

Sunflower PackTrak benefits include:

- Eliminate the need for additional high-volume shipping applications of assets that currently reside within the Sunflower Assets repository
- Accurately pack, receive and track shipments of assets from a single integrated application suite
- Quickly and accurately capture critical data elements for use during the shipment process

SUNFLOWER EXCESSTRAK (PRODUCT OVERVIEW)

Sunflower ExcessTrak™ improves and simplifies surplus asset tracking and management. It is designed specifically to meet the needs of organizations who rigorously track excess and surplus assets throughout the disposal process.

Sunflower ExcessTrak benefits include:

- Mobilize the workforce in surplus warehouses and salvage yards
- Reduce the time required to prepare assets for sale
- Eliminate miscommunication or misdirected assets between responsible parties
- Group assets in “lots” for bulk sales and still track at the individual asset level
- Trim down resources required to track, manage and dispose of excess/surplus assets

The following graphic illustrates the Sunflower Enterprise product suite offerings:

Sunflower Enterprise							
	Sunflower Products						
	Sunflower Assets	Sunflower Assets Express	Sunflower Contracts	Sunflower Sentry	Sunflower MobileTrak*	Sunflower ExcessTrak*	Sunflower PackTrak*
Agreements	X	X	X				
Management	X	X		X			
Inactive	X		X				
Finance	X						
Excess	X	X	X	X			
Review	X	X	X	X			
IT Components	X						
Administration	X	X	X	X			
Contracts			X				
Sentry				X			
MobileTrak					X		
ExcessTrak						X	
PackTrak							X
HTML Transaction Pages	X	X	X	X			
Stock Asset Management	X		X				

Figure 1-2: Sunflower Enterprise Product Suite Table

SUNFLOWER ENTERPRISE INDUSTRY SOLUTIONS

The following graphic demonstrates some product configurations that can provide industry specific solutions based on the Sunflower Enterprise product suite offerings:

Industry	Solutions
Enterprise	Sunflower Assets® Sunflower Sentry™ Sunflower MobileTrak™ Sunflower PackTrak™
Gaming and Leisure	Sunflower Assets® Sunflower Sentry™ Sunflower MobileTrak™ Sunflower ExcessTrak™
Hospitals	Sunflower Assets® Sunflower MobileTrak™ Sunflower PackTrak™ Sunflower Sentry™
Organizations under Government Contract	Sunflower Assets® Sunflower Contract Reports™ Sunflower Sentry™ Sunflower MobileTrak™ Sunflower ExcessTrak™
Federal Government	Sunflower Assets® Sunflower Sentry™ Sunflower MobileTrak™, ExcessTrak™, PackTrak™
Higher Education	Sunflower Assets® Sunflower MobileTrak™ Sunflower ExcessTrak™ Sunflower Contract Reports™ *(in some situations)*

Figure 1-3: The Sunflower Enterprise Product Suite and Industry Solutions

LIFECYCLE ASSET MANAGEMENT

Lifecycle Asset Management is the process of monitoring, controlling and accounting for assets throughout their lifecycle.

Lifecycle Asset Management consists of the following stages:

- Obligate Funds for an Asset and Procure
- Custodial Transfers and Organizational Accountability
- Physical Inventory Reviews
- Financial Accounting and Depreciation
- Maintenance Repair and Upgrades
- Utilization and Re-use
- Excess and Retirement

By capturing the data during each of these stages, and then analyzing and reporting on this diverse set of information, your organization can establish a holistic representation of the assets in which you have invested your resources. This information becomes the foundation for optimizing the use and deployment of assets throughout the organization while, at the same time, maintaining strict accountability for all assets.

2

ROLES

Data managed in Sunflower is grouped into modules based on the type of management activities performed during an asset's lifecycle. Sunflower's philosophy is that every asset has a complete lifecycle that you can manage. Who manages the various aspects of an asset at each stage of the lifecycle will depend upon your organizational structure and processes. Sunflower does not define any one way by which you have to manage your assets but provides you guidelines, structures and tools for the best possible view of your assets.

KEY CONCEPTS

This chapter includes the following discussion points and concepts:

- "Roles"
- "Roles At a Glance"
- "Organizations, Contact Types and Roles"
- "Administration Roles"
- "Inventory Management Roles"
- "Financial Roles"
- "Agreement Roles"
- "Inactive Roles"
- "Excess Roles"
- "Review Roles"
- "IT Components Roles"
- "Secondary Roles"

ABOUT ROLES

Accounting for assets throughout your organization requires tracking and management of assets from procurement to retirement. To track your assets, assign employees the task of managing various aspects of the asset lifecycle. Sunflower provides modules for managing stages for day-to-day property management, contractual agreements, financial accounting, physical inventory reviews, inactivity, retirement, IT management and general administration as well as the capability to manage assets through reporting and web transactions. Sunflower manages the asset lifecycle by using the following modules:

- Agreement
- Management
- Finance
- Inactive
- Excess
- Review
- IT Components
- Administration
- Reports

Each module within Sunflower is accessible through one or more predefined roles. Every individual working with Sunflower applications is assigned a user name, password and one or more roles. Not only are roles an integral component of Sunflower application security, but they also control the views and screens for which a user is authorized to work.

ROLES AT A GLANCE

At a glance, Sunflower provides the following roles.

MODULE	INFORMAL ROLE NAME	DATABASE ROLE NAME	DESCRIPTION/ EXPLANATION
Administration	Administrator	AS_ADMINISTRATOR	**Perform overall setup and maintenance.**
	Domain	AS_DOMAIN_ADMINISTRATOR	**Administration module access only.**
Agreement	Agreement Clerk	AS_AGREEMENT_CLERK	**Manage specific Org. Agr assets.**
	Agreement Manager	AS_AGREEMENT_MANAGER	**Manage all agreements & assets.**
Excess	Excess Clerk	AS_EXCESS_CLERK	**Manage specific Org. EX assets.**
	Excess Manager	AS_EXCESS_MANAGER	**Manage all EX assets.**
Finance	Financial Clerk	AS_FINANCIAL_CLERK	**Manage specific Org. FN assets.**
	Financial Manager	AS_FINANCIAL_MANAGER	**Manage all FN assets.**
Inactive	Inactive Clerk	AS_INACTIVE_CLERK	**Manage specific Org. INA assets.**
	Inactive Manager	AS_INACTIVE_MANAGER	**Manage all INA assets.**
IT Components	IT Clerk	AS_IT_CLERK	**Manage IT components.**
	IT Manager	AS_IT_MANAGER	**Manage all IT assets & assign IT Clerks.**
Review	Review Clerk	AS_REVIEW_CLERK	**Maintain review campaigns.**
	Review Manager	AS_REVIEW_MANAGER	**Define & manage review campaigns & ACR duties for specific organizations.**
Management	ACR (Asset Center Representative)	AS_ASSET_CENTER_REPRESENTATIVE	**Limited management of existing INV assets.**
	Inventory Clerk	AS_INVENTORY_CLERK	**Manage specific Org. INV assets.**
	Inventory Manager	AS_INVENTORY_MANAGER	**Manage all INV assets.**

MODULE	INFORMAL ROLE NAME	DATABASE ROLE NAME	DESCRIPTION/ EXPLANATION
Additional Roles	Cataloger	AS_CATALOGER	Able to create & modify Catalog items.
	Custodian	AS_CUSTODIAN	Make changes to assets to which they are assigned as Custodian.
	Developer	AS_DEVELOPER	Limited to Sunflower Developers only.
	Encrypt Decrypt	AS_ENCRYPT_DECRYPT	Supplemental role to specify the desired fields for encryption.
	Job User	AS_JOB_USER	Used to perform automated processes such as predefined batching & interfacing.
	Proxy User	AS_PROXY_USER	The Proxy User, or the Sunflower Proxy, is a database user ID that contains all of the Sunflower roles. The Proxy User role is used for calling APIs and authenticating users. This role is not assigned to a user but used by default behind the scenes if implementing proxy user authentication
	Query Only	AS_QUERY_ONLY	Read only viewing, no data entry ability.
	Subset Manager	AS_SUBSET _MANAGER	Placeholder for future use.
	Trace	SA_TRACE	Used by an Administrator to solve issues.
	User	AS_USER	Make very limited changes to assets to which they are assigned as the user.
	Web Reports User	AS_WEB_REPORTS_USER	Allows view-only access to reports.

ROLE BASICS: CLERKS AND MANAGERS

Each asset module role differs in the nature of its privileges and complexity. The following section provides a discussion about roles, privileges and the nuances of the Management module. Before discussing the specifics of each role, there are some general similarities in structure that will help you understand some of the basic concepts of roles and their privileges within Sunflower applications.

Comparing the various roles available to Sunflower applications, each of the modules has two recurring roles, a clerk and a manager. The exception is the Management module where an additional role, the Asset Center Representative (ACR), is available.

Sunflower uses roles to provide access and actions to the application. When comparing roles across modules, there are similarities in the levels of accessibility and actions that both manager and clerk roles can provide. Between the two roles, the manager is the user who has access to all screens in a respective module. Additionally, a manager can access certain sets of screens in the Administration module but the clerk has no access to this module. The Clerk has limited access and actions to the screens within a module. While both clerks and managers can create, update and finalize any interest assets within their respective module, only the manager can create, update and delete a list of values (LOV) for a respective module as well as perform other module specific configuration activities.

CLERKS

Taking a closer look at the responsibilities of clerks and managers, the difference in privilege and responsibility is similar to that found in many organizations. Clerks, under the supervision of a higher authority, perform a variety of regular predefined tasks and duties based on established practices and procedures. Specific duties will vary based on the module (e.g. Agreement, Finance, Management etc.) for which the clerk operates. For example, an Inactive Clerk is responsible for the receipt and storage of inactive assets as well as the redistribution of inactive assets. A Review Clerk is responsible for taking physical inventory of stock.

MANAGERS

Managers are distinguished from clerks by their greater breadth of responsibility. Managers have access to all functionality, screens and operations in their respective modules, while clerks have restricted access to functionality, screens and operations for their respective modules. For example, clerks cannot perform administrative tasks. Typical administrative tasks include defining a list of values or parameter settings.

ORGANIZATION CONTACTS

Sunflower employs a concept called **Organization Contacts**. Organization contacts enable users to work with assets based on the organizations to which they are assigned. Because an asset belongs to an organization, you can control which users are able to work (e.g. create assets, change asset information etc.) with a group of assets based on the organization to which they belong.

Organization contacts affect the following roles:

- Inventory Clerks
- Asset Center Representatives (ACRs)
- IT Clerks
- Review Managers

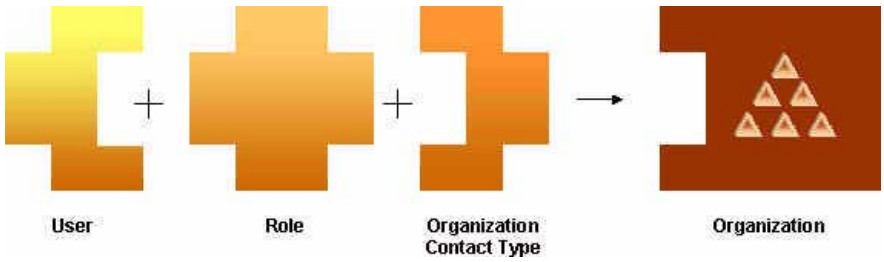


Figure 2-1: User-Role-Organization Relationship.

You assign roles to users to control the functions that they are able to perform. Assigning an organization contact type and organization is required when the role is an ACR, IT Clerk or Inventory Clerk. This composite assignment enables those roles to work with assets for the specified organizations.

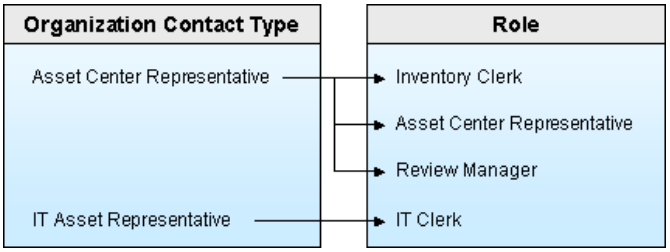
Inventory Clerks and ACRs are inventory management roles. A Review Manager is a review module role while an IT Clerk is an IT Components module role. What is important about each of the previous roles is how that role, in conjunction with an organization and organization contact type, enables each role to work within its respective module. Refer to the following sections for more information about the module role capabilities:

- “Administration Roles” on page 24
- “Inventory Management Roles” on page 26
- “Financial Roles” on page 30
- “Agreement Roles” on page 31
- “Inactive Roles” on page 32
- “Excess Roles” on page 33
- “Review Roles” on page 34
- “IT Components Roles” on page 36
- “Secondary Roles” on page 38

ORGANIZATION CONTACT TYPES

Organization contacts contain an attribute called the **Organization Contact Type**. The organization contact type enables a user, with the properly assigned role, to manage assets. There are two organization contact types:

- Asset Center Representative (Asset Center Rep.)
- IT Asset Representative (IT Asset Rep.)



The Asset Center Representative contact type should not be confused with the ACR role. The Asset Center Representative and IT Asset Representative organization contact types are organization contact types provided with Sunflower applications. You can define additional organization contact types. The definition of new organization contact types requires additional coding to provide the same functionality that is enabled by the factory delivered values.

Organization contact types enable specific Sunflower application roles to work with assets or asset components. The Management module manages inventory assets while the IT Components module manages IT asset components. Within their respective modules, Administrators and Managers are responsible for the assignment of organization contact types. For example, Administrators and Inventory Managers assign Inventory Clerks and ACRs as Asset Center Representatives for the departments that they are responsible.

IN THIS MODULE	THIS ROLE	ASSIGNS THE ORG. CONTACT TYPE	TO THIS ROLE
Management	Administrator	Asset Center Representative	Inventory Clerk
Management	Administrator	Asset Center Representative	ACR
Management	Inventory Manager	Asset Center Representative	Inventory Clerk
Management	Inventory Manager	Asset Center Representative	ACR
Review	Administrator	Asset Center Representative	Review Manager
IT Components	Inventory Manager	IT Asset Representative	IT Clerk
IT Components	IT Manager	IT Asset Representative	IT Clerk

Only the Review Manager and Administrator have the organization contact association, giving them access to all assets across all organizations regardless of the module. The other Manager roles (e.g. Inventory Managers and IT Managers) do not have the organization contact association and therefore are restricted to working with assets within their respective modules.

ORGANIZATIONS, CONTACT TYPES AND ROLES

Every Sunflower application user is assigned one or more roles. If the role is an Inventory Clerk, ACR or IT Clerk, several additional assignments must occur in order for the user to begin working with assets. The following steps outline how to set up a user to work with assets within their organization:

Step 1. Create the user.

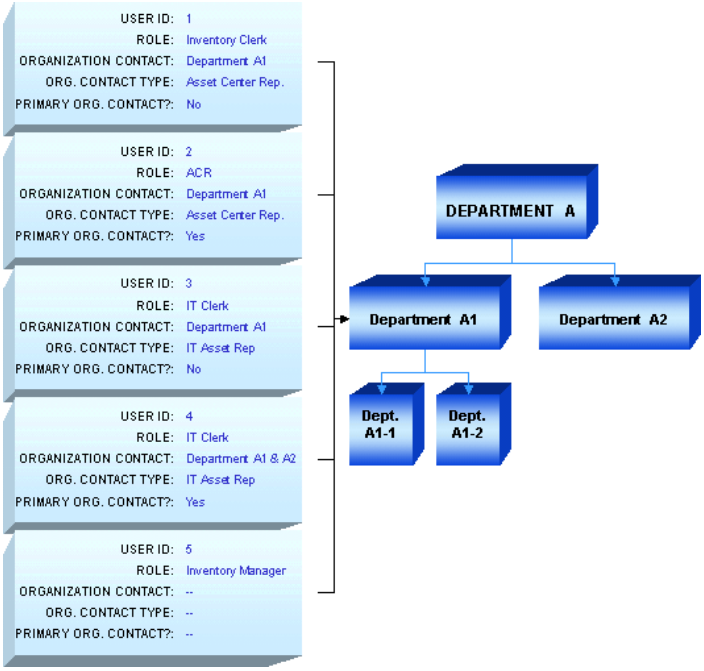
Step 2. Assign roles.

Step 3. If the user is the ACR, Inventory Clerk and/or IT Clerk role, specify the organizations for which the user is an organization contact.

Step 4. Specify the appropriate organization contact type.

NOTE: If you fail to assign the organization contact type to the user, the user will not be able to perform the actions of the roles assigned to that user.

In the illustration below, there are five users with varying roles.



Users 1 thru 4 are organization contacts for Department A1. User 4 is responsible for the asset components of Department A1 and A2 and therefore has been assigned as the organization contact for both departments. An organization contact has not been specified for User 5, an Inventory Manager, since managers can work with any inventory asset across all departments and organizations. The same concept applies to the Administrator role except that Administrators can work with all assets regardless of the interest asset type. Sunflower validates and authenticates users based on the user ID, role and, when required, the organization contact type, thus employing an additional layer of data security and asset management granularity at the role level.

Figure 2-2: Organization Contacts.

PRIMARY ORGANIZATION CONTACTS

A **Primary Organization Contact** is another concept that you can employ when defining organization contact types. Use the primary organization contact to specify the person who is the main point of contact for an organization. This enables other users to know who to contact within an organization should there be a question or issue about an asset. The name of the primary contact displays in the **Rep** field on the asset summary and history and asset management screens.

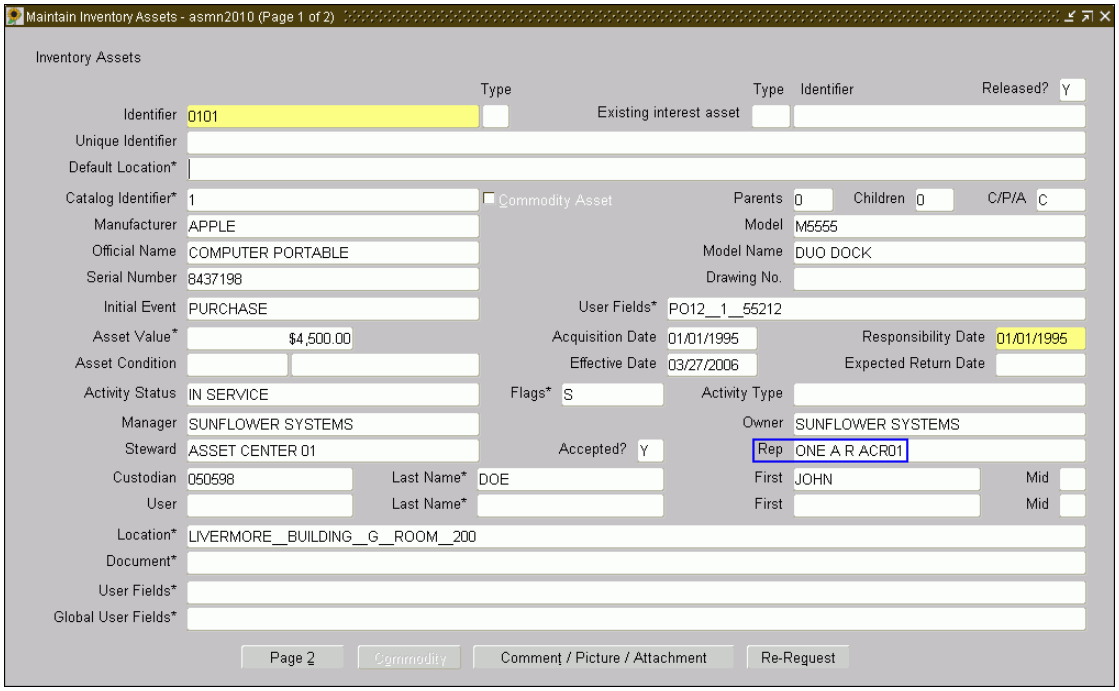


Figure 2-3: Rep Field Displays the Name of the Primary Organization Contact.

Defining a primary organization contact is optional. When using this feature, only one user per organization contact type may be assigned as the primary contact for an organization. Refer to the figure 3-2, “Organization Contacts.” on page 21, which illustrates that User 2 and User 4 are the primary contacts for Department A1.

PRIMARY ROLES

Roles are the logical grouping of a set of functions that are assigned to one or more users. Sunflower application roles have a telescoping capability which, when combined, can broaden or diminish a users view and ability to perform tasks within the application.

This section discusses the following roles:

- "Administration Roles" on page 24
- "Inventory Management Roles" on page 26
- "Financial Roles" on page 30
- "Agreement Roles" on page 31
- "Inactive Roles" on page 32
- "Excess Roles" on page 33
- "Review Roles" on page 34
- "IT Components Roles" on page 36

ADMINISTRATION ROLES

The **Administration** module is designed to tailor your Sunflower applications to business policies and requirements that are unique to your organization. Many of the screens are accessible to other Sunflower application roles. There are two roles (**Administrator** and **Domain Administrator**) that are used to manage the Administration module.

ADMINISTRATOR

Administrators perform setup and ongoing maintenance activities for Sunflower applications. As a result, this role is not confined to the screens provided within the Administration module. The Administrator is the person that performs setup related tasks, and grants other users access to Sunflower applications. The administrator is the super user who can perform just about any action within any Sunflower application module.

Key tasks that the Administrator can perform includes the creation, editing and maintenance of the following:

- Users
- Domains
- Locations
- Organizations
- Organization Contacts
- Application Parameters
- Organization Parameters
- Personal Parameters
- Asset Flags

The above list highlights key areas of activity for an administrator. For detailed discussion on administrative tasks see the Sunflower Enterprise Admnistration Guide.

DOMAIN ADMINISTRATOR

The **Domain Administrator** is an administration role with fewer privileges than that of the Administrator role. The Domain Administrator's access is restricted to the Administration module. Why assign the Domain Administrator role as opposed to the Administrator role? The Domain Administrator role provides access to the Administration module without enabling the user the ability to edit or create assets. This role can apply to most of your technical users, such as a database administrator (DBA) or system administrator, providing the access they need to perform the setup and maintenance activities without the access to asset management related activities.

The Administrator has virtually no restrictions when working with Sunflower applications; they can create and retire assets etc. The Administrator cannot accept new asset requests or asset transfers. This action must be performed by an ACR or an Inventory Clerk because this is the sole responsibility of the receiving organization contact.

The Domain Administrator is primarily responsible for such actions as the creation and maintenance of list of values (LOVs) or domains for the various interest assets without the functional responsibility for asset operations. The Domain Administrator maintains domains, users, event types, parameter definitions etc.

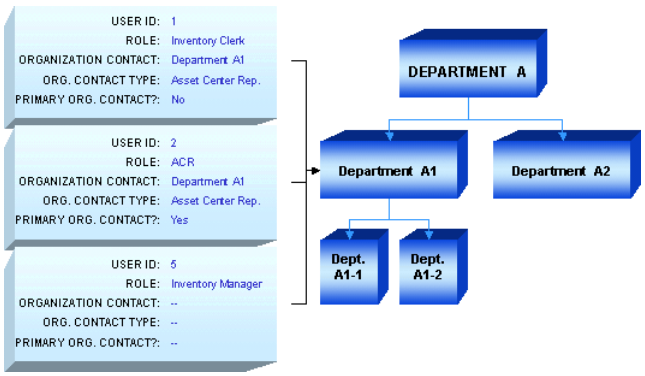
Key tasks that the Domain Administrator can perform include the creation, modification, deletion and general maintenance of list of values for the simple and complex domains. For more information about domains, see the Sunflower Enterprise Admnistration Guide.

INVENTORY MANAGEMENT ROLES

The management of activities related to your organization's accountable assets is typically performed by a property management organization. Sunflower enables you to manage inventory assets by using the Management module. There are three roles that are used to manage inventory assets, the **Inventory Manager**, **Inventory Clerk** and **Asset Center Representative** (**ACR**).

Within the Management module, the Inventory Manager and Inventory Clerk perform similar functions, while the Asset Center Representative (ACR) performs a smaller subset of these functions. There is a separation of responsibility between these roles based on the concept of organization contact types. When working with inventory assets, you must assign Inventory Clerks, and ACRs as Asset Center Representative contacts for the organization to which the assets belong. For more information see "Organization Contacts" on page 18.

For example, in the illustration to the right, there is an organization consisting of five departments in a parent-child hierarchy. User 1 is an Asset Center Rep. for Department A1. As a result, User 1 is able to work with assets in this organization based on the functionality that is enabled by the assigned role, Inventory Clerk. User 2 is also an Asset Center Rep. for Department A1. Unlike User 1, User 2 has the role of an ACR, which limits the functions that User 2 can perform on the same assets in Department A1. The concept of organization contacts does not apply to Managers. In this case, User 5, an Inventory Manager, can work with all of the inventory assets in all of the departments across the organization.



The parent-child relationship between departments and organizational hierarchy does not give your users access or authority to manipulate assets. There is no hierarchical order of assignments between ACRs and Inventory Clerks. You can assign both roles to the same or different organizations and you can assign the same users to manage assets in multiple departments of your organization. The difference between the two roles is the tasks that they can perform. It is essential that you assign Inventory Clerks and ACRs as Asset Center Representatives to the departments in which they work.

WHAT ROLES APPLY TO MY ORGANIZATION?

While the Management module provides three roles, it is unlikely that you will need to make use of all three. In most cases, you will assign Inventory Managers and Inventory Clerks or Inventory Managers and ACRs. The management roles you choose will depend on the answers you provide to the following questions:

- Does your organization work as a centralized or decentralized asset management group?
- Who in your organization is responsible for the creation of assets?

The Inventory Manager role is assigned to an individual or group of individuals, (centralized asset management group), where one person, or group of persons, is responsible for the creation of assets for your entire organization. Within this centralized group, you will assign several ACRs who are responsible for managing the day-to-day aspects of your assets such as the assignment of custodians, users and assets.

You will make extensive use of the Inventory Clerk role if you have a decentralized asset management group where each department has one or more employees responsible for creating and distributing assets for their respective department. You should assign an Inventory Clerk or another employee as the Inventory Manager for administrative oversight. The Inventory Manager is responsible for overseeing the inventory operations of the entire organization. The Inventory Clerks are responsible for creating and managing assets, which includes the maintenance of custodians, locations and user information for their respective organizations. From this perspective, a decentralized organization does not require ACRs unless you have multiple layers of hierarchy within your department.

If you have a large community of ACRs, custodians and users, you can take advantage of the Sunflower **HTML Transaction Pages**. HTML Transaction pages provide the ability to perform common Sunflower application functions such as updates to user and asset information or the recording of resolutions for physical inventories. Because HTML Transaction Pages are web enabled, you do not need to install the client-based format of a Sunflower application for large group of users who do not need to utilize the expansive set of forms available with a Sunflower application. For more information about using HTML Transaction pages, see the Sunflower Assets User Guide.

INVENTORY MANAGER

The Inventory Manger has the ability to manage (e.g. create, modify, retire) all inventory assets. The Inventory Manager role controls all of the activities within the realm of asset management providing them complete access and control within the Management module. Additionally, the Inventory Manager is responsible for general administration tasks such as the definition and maintenance of domains for inventory assets. Some of the tasks the Inventory Manager role can perform are as follows:

- Create Inventory Assets
- Define Organizations
- Assign Steward Contacts (e.g. Inventory Clerks and ACRs)

NOTE: You cannot assign Inventory Managers as steward contacts.

INVENTORY CLERK

The Inventory Clerk can perform the same actions as the Inventory Manger but only for those assets within the organizations (including any child organizations) that the Inventory Clerk has been assigned to as a steward contact. Some of the tasks the Inventory Clerk role can perform are as follows:

- Create Inventory Assets
- Use Parameters to Customize User Fields
- Manage Asset, Custodian and User Information

NOTE: Assign users as inventory managers or inventory clerk in order to work with the Sunflower Sentry product.

NOTE: Users working with the Personal Asset Provisioning feature must be assigned as an inventory manager and inactive manager combination in order to carry out all transactions. Similarly, inventory clerks and inactive clerks roles can be assigned but further limitations to the assets that they can manage as mentioned previously.

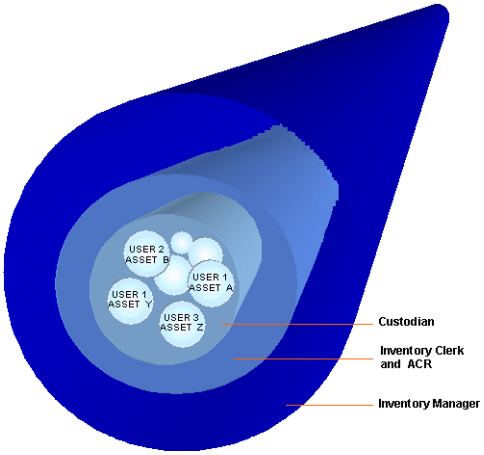
ASSET CENTER REPRESENTATIVE (ACR)

Similarly, ACRs can work with the same assets that Inventory Clerks work with but the ACR can only perform functions that are enabled by the ACR role, for those organizations to which they have been assigned to as a contact. ACRs can modify asset information for multiple organizations if they are the ACR of the parent organization. The primary difference between an Inventory Clerk and an ACR is that an ACR cannot create assets and have limited access to the Management module application (e.g no access to the **Maintain Inventory Assets** screen). ACRs, however, can edit the following asset information:

- Custodian
- Location
- Users

In addition to ACRs, you can further define accountability at the individual asset level. Within each organization there is another group of user roles that you can assign to perform tasks for specific assets. These roles are known as Custodians and Users. Most of your Sunflower application users will consist of ACRs, Custodians and Users.

Custodians and Users are additional roles with distinct functions within Sunflower. While an ACR is the responsible party for a group of assets, each asset can have only one assigned Custodian and User, which provides an increased level of asset accountability. ACRs can change an asset's Custodian, User and Location information. Custodians and Users can change or request a change to asset specific information for those assets that are assigned to them. For more information about Custodian and User roles, see "Secondary Roles" on page 38.



FINANCIAL ROLES

The Sunflower Finance module is composed of a series of functions that help you manage tasks that are typically performed by the property accounting department. In this respect, roles within this category manage assets that have financial implications from asset capitalization to the calculation of depreciation. There are two primary roles that are used to manage assets with financial ties, the **Financial Manager** and **Financial Clerk**.

FINANCIAL MANAGER

Financial Managers control all activities related to financial assets and as a result have complete access and control within the Finance module. Additionally, the Financial Manager is responsible for general administration tasks such as the definition and maintenance of domains for financial assets. While managers can perform the same activities as that of the clerk, financial managers also perform tasks such as:

- Define Fiscal Calendar
- Setup Accounting Periods
- Define Journal Entry Rules and Templates
- Manage Ledger Batches

FINANCIAL CLERK

Financial Clerks perform many ongoing activities related to the management of financial assets. The clerk is able to perform tasks such as,

- Capitalize Assets
- Record Uncapitalized Reasons
- Change Financial Asset Information
- Create Financial Asset Final Events

AGREEMENT ROLES

The Sunflower Agreement module enables you to assign and manage assets by the contracts under which they are acquired and/or are used. Contracts are commonly known as agreements and a subset, or all, of your assets may have contractual ties over the course of their life. In this respect, roles within this module maintain a complete history of each asset-to-agreement assignment which includes information about the acquisition, transfer of assets between agreements and asset disposition. There are two primary roles that are used to manage assets with contractual ties, the **Agreement Manager** and **Agreement Clerk**.

AGREEMENT MANAGER

Agreement Managers control all activities related to agreement assets and as a result have complete access and control within the Agreement module. Additionally, the Agreement Manager is responsible for general administration tasks such as the definition and maintenance of domains for agreement assets. While managers can perform the same activities as that of the clerk, Agreement managers also perform tasks such as:

- Create Agreements And Agreement Types
- Manage Agreement Authorizations
- Setup Agreement Asset Classifications
- Create Agreement Assets

AGREEMENT CLERK

Agreement Clerks perform many of the same activities as that of the manager. Agreement clerks have specific boundaries of control, similar to that of Inventory Clerks in the Management module. The clerk can perform relevant activities for a specified organization or group of organizations for which the clerk is assigned as the authorized contact. The concept of **authorization** is based on agreements, at a detailed level, and agreement types, at a broad level. Authorization is assigned by an Agreement Manager which enables Agreement Clerks to work with one or more groups of assets. Within those boundaries, the Agreement Clerk is able to perform tasks such as:

- Transfer agreements
- Change agreement asset information
- Create agreement asset final events

NOTE: Users working with Sunflower Contract Reports must be assigned as Agreement Clerks or Agreement Managers.

INACTIVE ROLES

An inactive asset is an assets in storage or that is not currently in use. The tracking of inactive assets is another important stage of the asset lifecycle and Sunflower provides an entire module targeted towards the management and utilization of inactive assets. There are two primary roles that are used to manage inactive assets, the **Inactive Manager** and **Inactive Clerk**.

INACTIVE MANAGER

Inactive managers not only manage the process of converting active assets into inactive assets but they also perform the administrative activities required in order to create and maintain inactive assets. Additionally, the Inactive Manager is responsible for general administration tasks such as the definition and maintenance of domains for inactive assets. While managers can perform the same activities as that of the clerk, Inactive managers also perform tasks such as:

- Create Inactive Asset Event Types
- Define Inactive Types
- Maintain Justification Schedules

INACTIVE CLERK

The Inactive Clerk performs the daily inactive asset management activities. Inactive Clerks perform tasks such as:

- Create Inactive Assets
- Receive Inactive Assets
- Change Inactive Asset Information
- Create Inactive Asset Final Events

EXCESS ROLES

Sunflower manages the disposal of assets with the Excess module. The Excess module enables you to easily perform tasks associated with managing assets that have become obsolete or surplus to your organization's needs. Each asset can be tracked from the time it is declared excess until the time of its final disposition. Along the way, Sunflower provides the ability to search for assets, declared as excess, for potential reuse. There are two primary roles that are used to manage excess assets, the **Excess Manager** and **Excess Clerk**.

EXCESS MANAGER

Excess managers perform the administrative activities that enable clerks to manage the daily activities related to excess assets. Additionally, the Excess Manager is responsible for general administration tasks such as the definition and maintenance of domains for excess assets. While managers can perform the same activities as that of the clerk, Excess Managers also perform tasks such as:

- Create Excess Asset Event Types
- Maintain Review Requirements
- Define Review Rules

EXCESS CLERK

The Excess Clerk performs the daily excess asset management activities. Excess Clerks perform tasks such as:

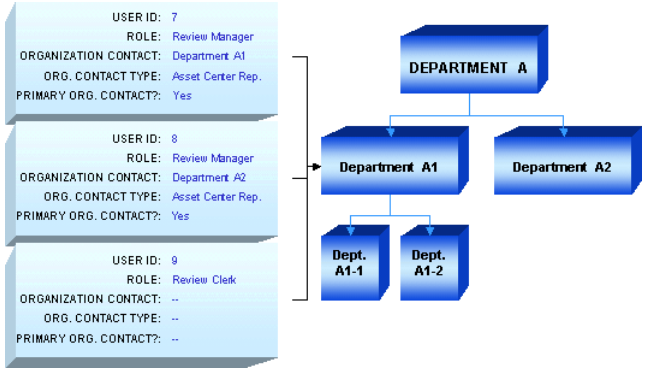
- Create Excess Lots, Lot Masters
- Receive Assets Into Excess
- Batch Excess Assets
- Retire Excess Assets

REVIEW ROLES

Sunflower provides the Review module to manage the physical inventory process. The Review modules makes the physical inventory process efficient, accurate and auditable. There are two primary roles that are used to manage the physical inventory process, the **Review Manager** and **Review Clerk**.

Like the Management module, the concept of organization contacts applies to the Review module. However, the Review module is unique in the way in which the organization contact type is applied to the Review Manager. Review Managers are assigned as the Asset Center Representative for the organizations for which they are defining review campaigns. In particular, the organization contact type enables the Review Manager to define a Sponsor for a review campaign. Recall from the discussion of “Organization Contacts” on page 18, that you can control which users are able to work with assets based on the organization to which the assets belong. The definition of review campaigns is an important step towards accounting for your assets. The assignment of an organization contact type to a Review Manager ensures the control of assets managed and accounted for through the review cycle. Review Clerks do not have the organization contact type association thereby allowing them to work with all review assets for any organization.

For example, in the illustration to the right, you have an organization consisting of five departments in a parent-child hierarchy. User 7 is a Review Manager for Department A1. As a result, User 7 can create review campaigns and manage review assets in this organization. User 8 is also a Review Manager but for Department A2. Alternatively, the concept of organization contacts does not apply to Review Clerks. Therefore, User 9, a Review Clerk, is not limited to those assets in Department A1 and can work with all review assets in all departments across the entire organization.



The parent-child relationship between departments and organizational hierarchy, does not give your users access or authority to manipulate assets. The difference between the two roles is determined by the tasks that they can perform.

NOTE: You must assign Review Managers as Asset Center Representatives for their departments.

REVIEW MANAGER

The most important role of a Review Manager is the definition and management of the review campaign. In order for a Review Manager to define a campaign, they must be assigned as the Asset Center Representative for the organizations conducting the review campaign. Additionally, the Review Manager is responsible for general administration tasks such as the definition and maintenance of domains for review assets. Review managers are predominantly responsible for the setup of campaigns that include tasks such as:

- Define Sponsors
- Define Valid Resolution Types
- Link Base Assets To Existing Resolutions

REVIEW CLERK

The Review Clerk performs the day-to-day tasks associated with maintaining and managing the review cycle that include tasks such as:

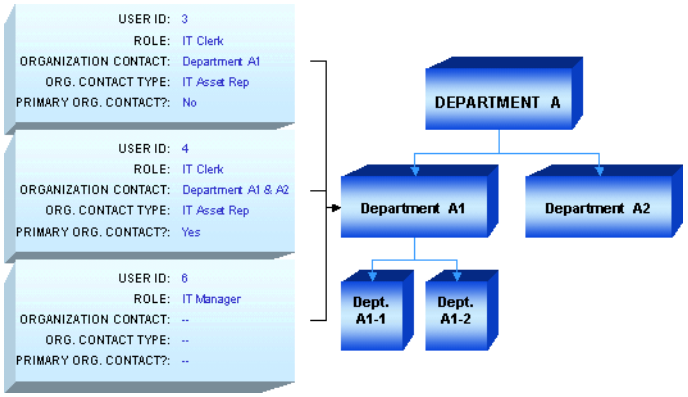
- Update Resolutions
- Generate Physical Inventory Progress Reports

IT COMPONENTS ROLES

Sunflower enables you to protect your investment in technology and track IT-related assets through the IT Components module. There are two primary roles that are used to manage IT components, the **IT Manager** and **IT Clerk**.

Take into account the following considerations when assigning IT component users. Similar to the roles within the Inventory Management module, the concept of organization contact types applies to the IT Components module as well, specifically, the role of the IT Clerk. IT Clerks work with and manage the IT components for accountable assets. Recall from the discussion of “Organization Contacts” on page 18, that you can control which users are able to work with assets based on the organization to which the assets belong. In order to work with IT Components, IT Clerks must be assigned as the IT Asset Representative for the organization to which the assets belong. In comparison to the managerial role, IT Managers do not use the organization contact type association thereby allowing managers to work with all IT components across all organizations.

For example, in the figure to the right, the illustration displays how several users with IT roles work with assets within an organization. The organization is composed of several departments where Users 3 and 4, both IT Clerks, are organization contacts for Department A1. User 3 works solely for Department A1 while User 4 is responsible for IT components for two departments and is assigned as the organization contact for both Department A1 and A2. Additionally, User 4 is the primary point of contact for IT related matters for both departments. An organization contact is not specified for User 6, an IT Manager, since IT Managers can work with any IT component across all departments and organizations.



In summary, the following is required to create a valid IT Clerk:

- Assign an IT Asset Representative Contact Type (“Organization Contacts” on page 18)
- Assign one or more organizations to the user is the organization contact
- Optionally, assign a user as a primary contact (“Primary Organization Contacts” on page 22)

IT COMPONENTS MANAGER

IT Components Managers maintain the IT assets from the definition of setup requirements to the daily management of those assets. While managers can perform the same activities as that of the clerk, IT Components Managers can also perform tasks such as:

- Assign IT Clerks
- Create IT Component Types
- Define IT Component Catalog Configurations
- Assign Components To Assets

IT COMPONENTS CLERK

IT Components Clerks perform tasks such as:

- Assign Asset Components
- Change Asset IT Component Attributes
- Transfer Asset IT Components
- Generate Asset IT Component Reports

SECONDARY ROLES

The following roles are secondary roles that you may choose to use in conjunction with one or more of the primary interest asset roles (e.g. Administrator, Inventory Clerk, Review Manager etc.). Consider the following support roles that allow users to perform a set of tasks and enable a specific set screens. The roles discussed in this section are grouped into the following two categories and defined based on their relevancy

1. End User - roles that affect the end user
2. Support Roles - roles that support tasks related to the database

END USER ROLES	SUPPORT ROLES
Cataloger	Encrypt Decrypt
Custodian	Trace
User	Web Report User
Query Only	Job User
	Proxy User

CATALOGER

The Cataloger role allows a user to create and modify catalog items. The creation of the catalog is an important setup and ongoing function that is used during the asset creation process. Assign this role to a user who is responsible for the definition and/or maintenance of catalog items. The Administrator is the only other role with the ability to create and maintain catalog items.

NOTE: Prior to the release of Sunflower Assets 3.7, the catalog could be maintained by all users assigned with the manager or clerk roles. If you want to retain this behavior from prior versions, use the script provided in the Sunflower Assets 3.7 Installation CD to automatically assign the Cataloger role to all users with the manager or clerk roles.

CUSTODIAN

A Custodian is the person that has day-to-day responsibility of an asset. Custodians are assigned by either an Administrator or any manager, clerk or ACR. Custodians can change or make requests for changes to assets for which they are the assigned custodian either through the main application or the **HTML Transaction** pages. Custodial updates to asset details includes changing and asset's Custodian, User, Location, Expected Return Date and/or Effective Date fields. When a Custodian requires a change to an asset for which they are not the assigned custodian they must make a request to that asset's custodian for the required updates.

Each asset can have one assigned Custodian. Although the assignment of a Custodian is optional, this role provides a more detailed level of asset accountability. For the most granular level of asset accountability, assign a User to an asset.

USER

The User role represents the individual who is assigned to use one or more assets within an organization. Although the assignment of a User is optional, this role provides the most granular level of asset accountability. This role enables the user to make changes to assets to which they are assigned with a limited number of Sunflower screens or via the **HTML Transaction** pages. Individuals with the User role can only change or request changes to asset details that include User, Location, Expected Return Date, and Effective Date information.

QUERY ONLY

The Query Only role provides limited functionality by providing users access to those screens that are read-only. Additionally, Query Only users can access forms such as Asset Summary and History screens, Reports and the Query function to research asset information.

ENCRYPT DECRYPT

Encrypt Decrypt is a supplemental role used to protect values stored in User-Defined Fields (**UDFs**). While not all UDFs may require encryption, you can choose to protect valuable information stored in UDFs such as serial numbers and software license keys by using the encryption feature. Users assigned the Encrypt Decrypt role can specify the desired fields for encryption. However, assignment of this role alone does not provide access to any screen in the application, therefore, add this role to a user with an Administrator or Domain Administrator role. The Encrypt Decrypt role determines which fields are to be encrypted and does not determine which users are able to view encrypted fields. Access to encrypted data is specified by a user definable SQL package. Use the SQL package to define rules that determine user access and visibility to encrypted values and fields.

Each major entity in Sunflower has a set of 30 UDFs. UDFs are optional and are used to define attributes that are specific to your organization. Each user-defined field is fully configurable for its data type, length, validation, list of values, etc. Additionally, you can encrypt each field. Values in encrypted fields are not shown to users who are not allowed to view or change the encrypted fields. Encrypted values are stored as encrypted in the Sunflower database so that anybody accessing the database from outside the application will see the encrypted value and not the actual value.

TRACE

The Trace role can be used by an Administrator to solve issues that may arise within the system. This role is normally paired with the Administrator role because this role alone will not provide a user access to any Sunflower application screen. An Administrator that has been assigned the Trace role can turn the trace function on and off as needed in order to display errors, generate a trace file on the database server and perform debugging activities.

JOB USER

The Job User role is used to perform automated processes such as predefined batching and scheduled interfacing that automates the transfer of data from one or more external applications into or out of Sunflower. For example, when an interface job is scheduled to run, the computer tasked with performing this process will need to login to Sunflower as a user of the application in order to access the data objects and APIs required to perform the scheduled activities. This computer, although not human, is still a user and therefore needs to be assigned a role in order to work within Sunflower**.** This role used for automated processes is the Job User role. The Job User role has access to all tables within the Sunflower Enterprise schema but it does not have access to any screens, reports or web pages.

PROXY USER

The **Proxy User**, commonly referred to as the Sunflower Proxy, is a database user ID that contains all of the Sunflower application roles. The Proxy User role is used for calling APIs and authenticating users. Since a Sunflower application user requires a database user ID and an application user ID, the Proxy User role minimizes the number of database user IDs required to access Sunflower applications by taking the place of the individual database user ID normally required for each user. The proxy user role is not assigned to a user but used by default behind the scenes if you choose to implement proxy user authentication.

WEB REPORT USER

The Web Reports User role enables view-only access to reports. This role has no access to view or perform actions in Sunflower application forms and provides anonymous user access. This role is used to provide anonymous authentication for report access. Similar to the Proxy User role, the Web Reports User role is automatically assigned to users through installation scripts. Anonymous user access enables any user within your organization to access Sunflower application reports from a hyperlink placed on your intranet or web page of your choosing.

3

User Interface

The User Interface chapter introduces you to the graphical user interface (GUI) and the terms that are generally used across the user interface for Sunflower applications. This chapter illustrates how to use Sunflower application forms as well as the toolbar, menus, and the online help system to manage your assets.

Key Concepts

This chapter includes the following discussion points and concepts:

- “Navigation”
- “Use the Tool Bar”
- “Search Techniques”
- “Complex Fields”

NAVIGATION

Understanding the structure of Sunflower applications can provide you with the ability to navigate through the application with ease. The Navigation section covers the following topics:

- "Sunflower Application Menus" on page 44
- "Sunflower Application Forms" on page 45
- "Key Terms and Definitions" on page 46
- "Navigate Forms" on page 47

SUNFLOWER APPLICATION MENUS

Each Sunflower module has a corresponding pull-down menu to perform most of your day-to-day tasks. Five of the menus, **Agree**, **Mgmt**, **Finance**, **Inactive**, and **Excess** are known as *Interest Asset* modules. Three of the menus, **Utility**, **Window**, and **Help**, provide additional user assistance. The following table defines the functionality of each menu.

PULL-DOWN MENU	FUNCTION
Agree	Manage assets associated with contracts, agreements, leases, warranties, property passes, loan-ins, and external loans.
Contract	Manage government contract reporting.
Mgmt	Record and maintain all active assets. (Typical day-to-day management of assets).
Sentry	Manage assets on loan.
Finance	Manage the financial aspects of an asset such as the set up of journal entry rules for monthly capitalization (cost and depreciation) events.
Inactive	Manage assets under repair, storage, held for future use, and/or acceptance.
Excess	Manage assets during the asset retirement process. Also implements screening periods and lotting processes.
Review	Define and manage the process for performing physical inventories.
IT Components	Manage IT asset components that do not get tracked as individual assets but as subcomponents of an asset (i.e. software, hardware, license keys, etc.).
Admin	Define and manage application, organization, and end user properties.
Reports	Generate reports related to each phase in the asset lifecycle.
Functions	Provides another method of performing the various Sunflower functions. You can use the mouse, keyboard (hot keys), or the Functions menu.
Utility	Administrative access to update passwords and database connections.
Window	Cascade, tile window vertically or horizontally, or identify the form in which you are currently working.
Help	Access on-line help.

NOTE: The **Functions** menu is only available when you open a screen.

SUNFLOWER APPLICATION FORMS

Sunflower applications operate in a browser-based environment. In the following example, the pull-down menus are used to navigate from the Splash Screen in order to get a first look at Sunflower and learn important terminology. The window (screen, page, panel, etc.) is commonly referred to as a form. The submenu provides a list of menu items. Notice that once a menu item is selected, the Tool Bar appears below the Menu Bar and the Functions pull-down menu is available. Rest (hover) the mouse pointer over any icon to view a hint for the icon's function. Hints display in the lower left-hand corner of the Status Bar.The following graphic illustrates a common Sunflower application screen with the new set of Sunflower application Tool Bar icons. Notice that once a menu item is selected, the Tool Bar appears below the Menu Bar. You can rest the mouse pointer over any icon to view a hint of the icon's function.

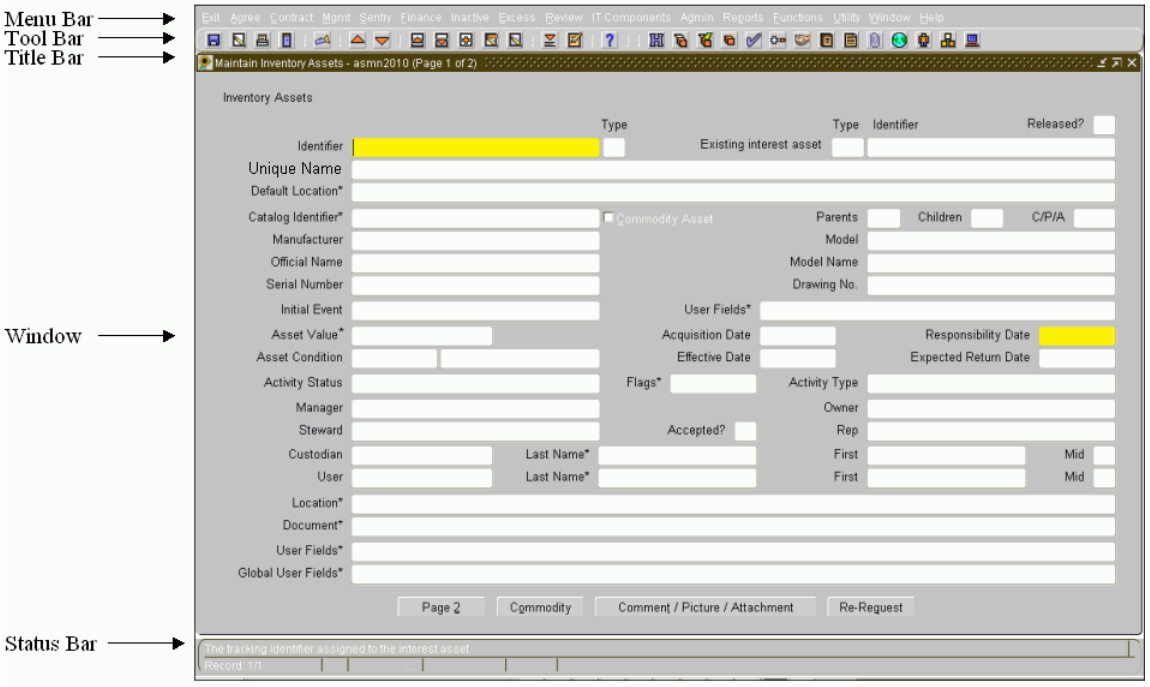


Figure 3-1: Viewing Sunflower Application Forms

KEY TERMS AND DEFINITIONS

It is important to understand Sunflower terminology. For common terms, see the following table.

TERM	DEFINITION
Icon	A graphic element that initiates a predefined action.
Field	An area in a window that displays data or allows you to enter data.
Menu Bar	A pull-down list of menus used to navigate to other forms or perform actions within a form.
Status Bar	Displays any status information and other information related to form processing. Also works in conjunction with the “Tool Tips” Bubble to provide field, icon, and button information.
Title Bar	Indicates the name of the window, context information pertinent to the information in that window, and provides page information (e.g. Page 1 of 2).
Toolbar	Icons used to navigate to other forms or perform actions within a form.
Tool Tips	Bubble help information created by moving your mouse over the top of an icon or button. Used to determine the function of an icon or button on the toolbar or form.
Window	A ***form***. An area where you, the user, interact with the application. Many windows can be open at one time and you can access these “overlapping” windows to perform data entry or data search activities.

NAVIGATE FORMS

Sunflower applications are built with Oracle technology. As a result, the look and feel is very similar to that of any Oracle application. When viewing forms, you should be familiar with the following additional terms.

NAVIGATION

- **Click Mgmt**
- **Click Process Inventory Assets PO Interface**

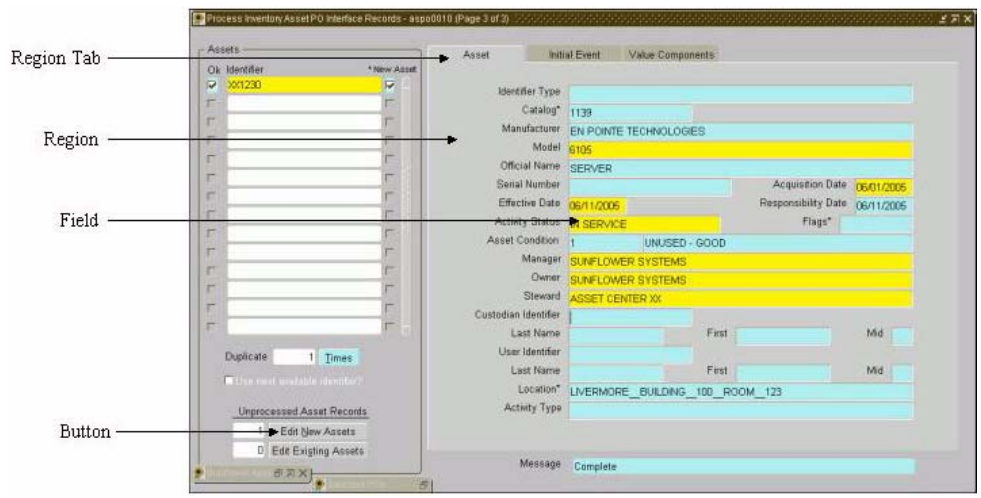


Figure 3-2: Navigating Sunflower Application Forms

TERM	DEFINITION
Field	An area in a window that displays data or enables you to enter data.
Region	A logical grouping of fields set apart from other fields by a box outline.
Region Tab	A collection of regions that occupy the same space in a window where only one region can be displayed at a time.

USE THE TOOL BAR

The tool bar is a collection of icons that perform specific actions when you click them. Each tool bar button replicates menu bar actions. Depending on the context of the current field or window, a tool bar button may be active or inactive. You can display help or a tool tip for an active tool bar button by holding your mouse over the button.

Save			Remove Record		Journal Entry
Clear All			Clear Record		Agreement
Print			Display List		Catalog
Exit			Edit		Document
Find			Help		Comment/Picture/Attachment
Previous Block			Summary & History		Location
Next Block			Initial Event		Person
Previous Record			Ongoing Event		Organization
Next Record			Final Event		IT Component Summary and History
Insert Record			Resolution		

Figure 3-3: Tool Bar Icons

SEARCH TECHNIQUES

Retrieving data from the database is a key technique required to maximize your effectiveness when working with Sunflower applications. The following section discusses and illustrates the most common ways in which you can search for and retrieve data, such as:

- Asset Search Screen
- Query Criteria Screen
- Maintain Inventory Assets Screen
- Asset Summary and History Screen
- Wildcard Searches
- Unique Identifier Search and Reporting Techniques

PERFORM A SIMPLE SEARCH

Simple searches are derived by using the **Asset Search** screen and provides a list of assets that meet the criteria you select. Perform a simple search and note that similar types of data are grouped together. Groups of data are sometimes separated by **blocks**. Jump between blocks by using the **Next Block** and **Previous Block** icons or your mouse. A **scrollbar** displays when there is additional information to view that cannot fit within the current window. You can search any interest or multiple interests from this form.

Scenario: The following graphic illustrates how to perform a simple search by using the Asset Search screen.

NAVIGATION

- **Click Mgmt**
- **Click Asset Search**
- **Use your Scrollbar or Next Record and Previous Record icons to view the list of items returned from your search.**

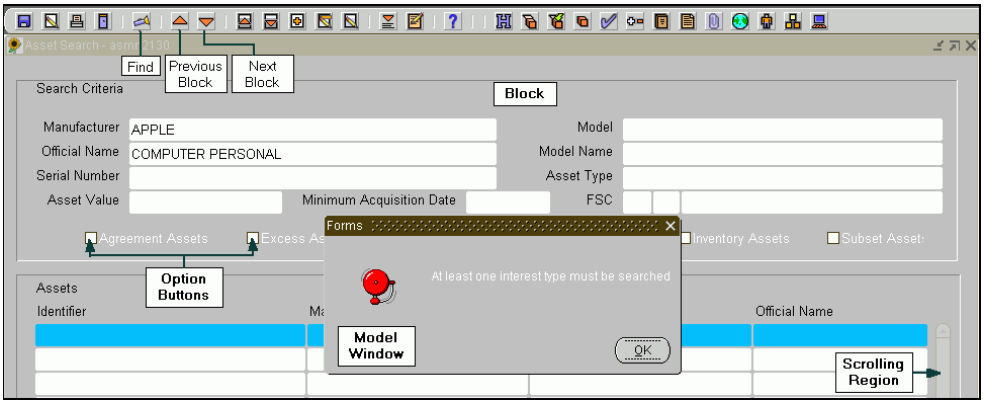


Figure 3-4: Using the Asset Search Screen

Step 1. Navigate to the **Asset Search** screen.

Step 2. Enter an asset's manufacturer. In this example, *Apple*.

Step 3. Enter an asset's official name.

Step 4. Select the interest type for the search. *Inventory*

Step 5. Click the **Find** icon to execute the search.

You can use the **Scrollbar**, the **Next Record** and **Previous Record** icons, or the **Arrow Up** and **Arrow Down** keys to view a list of assets retrieved by your search if more than one record is returned based on the search criteria. Use the **Previous Block** and **Next Block** icons to navigate between blocks.

QUERY FOR ASSETS

While simple searches are derived by using the Asset Search screen that provide a list of assets meeting the criteria you select, the **Query Criteria** screen provides a way to enter further details of the type of assets that you want to view. What is unique about the **Query Criteria** screen, is that it can be accessed from any screen in which you want to search on assets and return the relevant data to the specified screen.

Scenario: The following graphic illustrates how to use the Query Criteria screen to modify asset details on the Maintain Inventory Assets screen.

NAVIGATION

- **Click Mgmt**
- **Click Maintain Inventory Assets**
- **Click the Find icon**
- **Enter the *Search Criteria***
- **Click the Execute button**

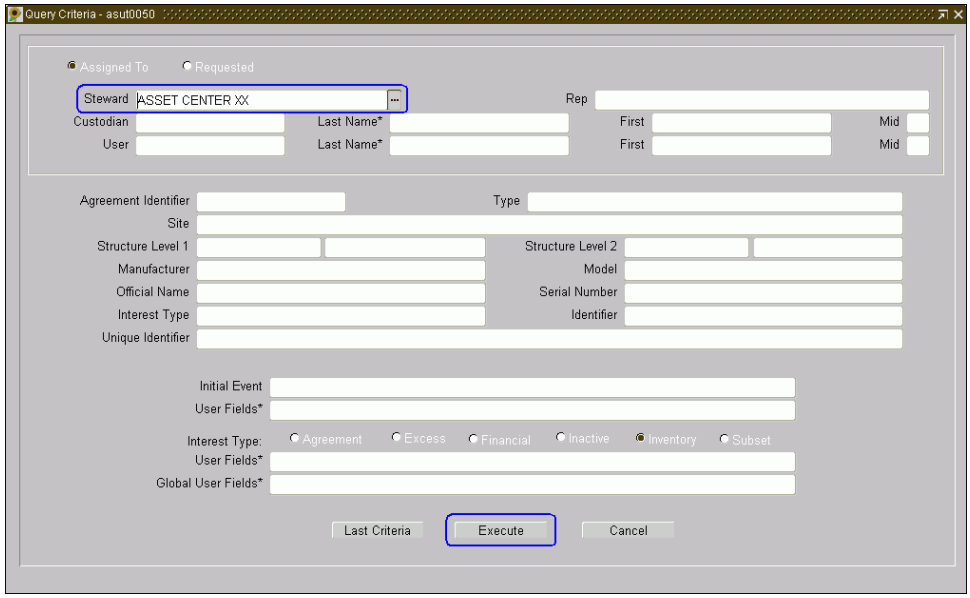


Figure 3-5: Using the Query Criteria Screen

Step 1. Navigate to the **Maintain Inventory Assets** screen.

Step 2. Perform a query for assets that belong to a specified steward organization by Clicking the **Find** icon to switch to query mode.

Step 3. The **Query Criteria** screen (shown above) displays.

Step 4. Double-Click in the **Identifier** field or click the **Display List** icon in the toolbar to view the list of values (LOV) for this field.

Step 5. Scroll through the list and select the desired value.

Step 6. The **Interest Type** defaults to *Inventory*, but may be changed as required to search a different interest.

NOTE: Only one interest type can be selected at a time.

Step 7. Click the **Execute** button.

You are automatically returned to the **Maintain Inventory Assets** screen, which is now populated with the results of your query.

NOTE: Take note of the **Status Bar** (located on the bottom left corner), which displays the number of returned records based on the search criteria. In the image below, you are viewing the 1st of 6 records.If the Record indication indicates 1/?, select **Functions > Record > Last**. This will provide the total count of records returned. Select **Functions > Record > First** to return to the top or first record.

NAVIGATION

- **Click the Next Record icon**

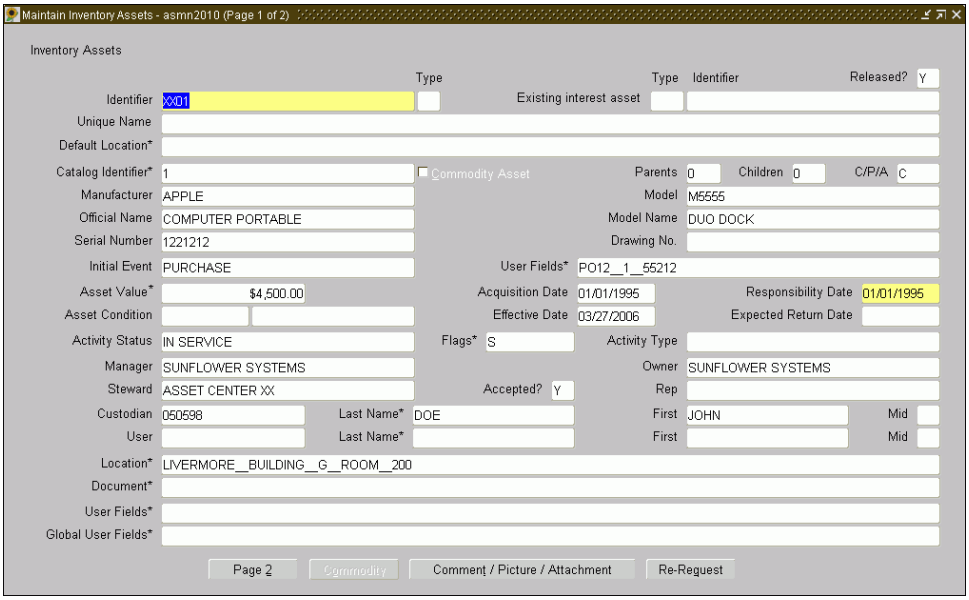


Figure 3-6: The Results of the Query Returned

You can scroll through the results of the query by clicking the **Next Record** icon.

When you have finished viewing all of the records, click the **Clear All** icon (located to the right of the **Save** icon) to clear the data from the screen. This does not delete assets but simply *clears the slate* so that you can perform a new search or some other action. If you click the **Clear Record** icon (located to the left of the **Display List** icon) you will clear or close only one record at a time.

NAME	ICON
Clear All	
Clear Record	

QUICK SEARCH

If you know a property record's identifier, you can perform a quick search to find the data associated with that individual asset.

NAVIGATION

- **Click Mgmt**
- **Click Maintain Inventory Assets**

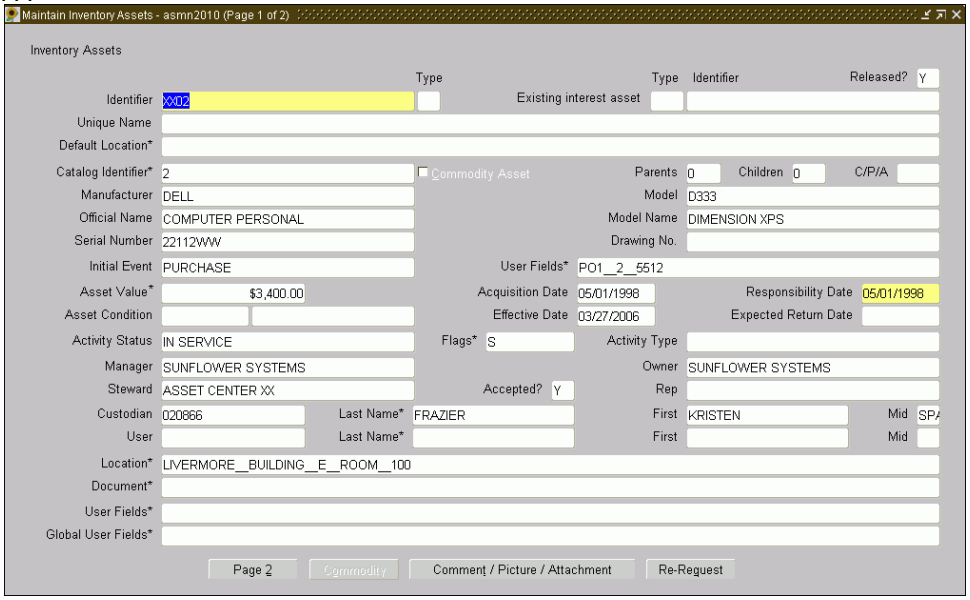


Figure 3-7: Viewing a Property Record

SEARCH WITH SUMMARY AND HISTORY

The **Summary and History** screen may become one of the most widely used screens that you and others within your organization will use to view asset information. Whether you know the identifier or not, you can perform a quick search to find current as well as historical information associated with a specific asset identifier. Similar to the **Maintain Inventory Assets** screen, you can use this screen to perform a direct search for a specific asset or query for a group of assets based on selected search criteria by clicking the **Find** icon to query assets and return the data to this screen.

Scenario: The following graphic illustrates how to use the Inventory Asset Summary and History screen to search for property record XX02. Select the **Include History** checkbox *prior* to entering the asset Identifier if you want to include historical information for the asset record(s).

NAVIGATION

- **Click Mgmt**
- **Click Inventory Asset Summary and History**

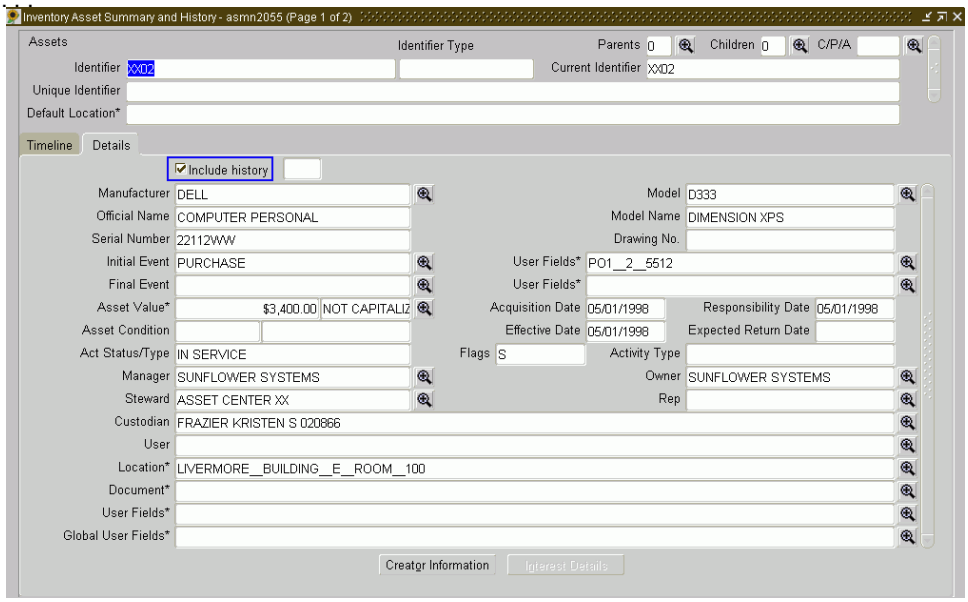


Figure 3-8: Searching with the Asset Summary and History Screen

Step 1. Navigate to the **Inventory Assets Summary and History** screen.

Step 2. Enter the identifier of the asset record in the **Identifier** field for which you are trying to locate information.

Step 3. Click the Tab key to retrieve the selected asset record.

Step 4. Click the **Timeline** tab to view the asset event details for the selected asset.

NOTE: You can view an asset's Summary and History from **any** Sunflower form that displays the asset Identifier. Select the asset Identifier field and then click the **Summary and History** icon. When you click the **Summary and History** icon, the **Include history** checkbox is automatically checked.

WILDCARD SEARCHES

Use wildcards to search a list of values (LOV). When a field contains a list of values that you can choose from, enter a wildcard character (**%**) in the search phrase to narrow the list of options as desired. However, when using wildcards, you cannot use query operators (such as >, <, and so on) in a **Query Criteria** screen.

Auto Selection

Using the list of values feature called **Auto Selection,** you can select a valid name from a pick list with a single keystroke. When you display the list of values window, you can type the first character of the name that you want in the **Find** field. If only one choice begins with the character that you enter, the Auto Selection feature selects that choice, closes the list window, and enters the value in the appropriate field. If the first character has more than one choice you can either select from the list of values or enter additional characters before you Tab out of the field.

List Search

Use the **Auto Reduction** feature to reduce a list when you know the first few characters of your name selection. If you do not know the initial characters of your choice, but do know that your choice contains a certain word or set of characters, you can perform a list search to reduce a list. In the list window, enter any group of characters as search criteria in the **Find** field and click the **Find** icon. You can use wildcard characters such as the percent sign (%) which represents any number of characters, or an underline (_), which represents a single character in your search criterion. For example, to reduce a list to only those choices that contain the phrase “schedule,” you would type **%schedule%** in the **Find** field and click the **Find** icon.The search mode is not case sensitive.

Wildcards

Wildcards can be used to search any field for which there is a list of values (LOV). The LOV feature is very useful while entering data. It provides you with a powerful, easy-to-use data entry method that increases your accuracy and productivity. Using the LOV makes data entry an easy task for novice users, and experienced users can enter correct data with a minimum number of keystrokes. Sunflower notifies you when a list acceptable input value is available for a field by displaying the LOV icon in the field and displaying the term, List of Values, in the Status Bar. When you display a list, the values appear in a window with a title that describes the contents.

USING THE LIST OF VALUES

Using the LOV feature in combination with wildcards can save you time and maximize correct data entry without having to memorize or look up valid data for each field. Simply choose data from an online list of valid input choices whenever you want. Additionally, you are relying on Sunflower Applications to validate your input since you will know right away if your entry does not match an option from the LOV. The combination of the % with a character will display sets of results.

- Use **%** to return the complete list of values. (A blank field works the same as using %.)
- Use **character** + **%** to return all values that begin with the character(s).
- Use **%** + **character** to return all values that contain the characters anywhere within the value.

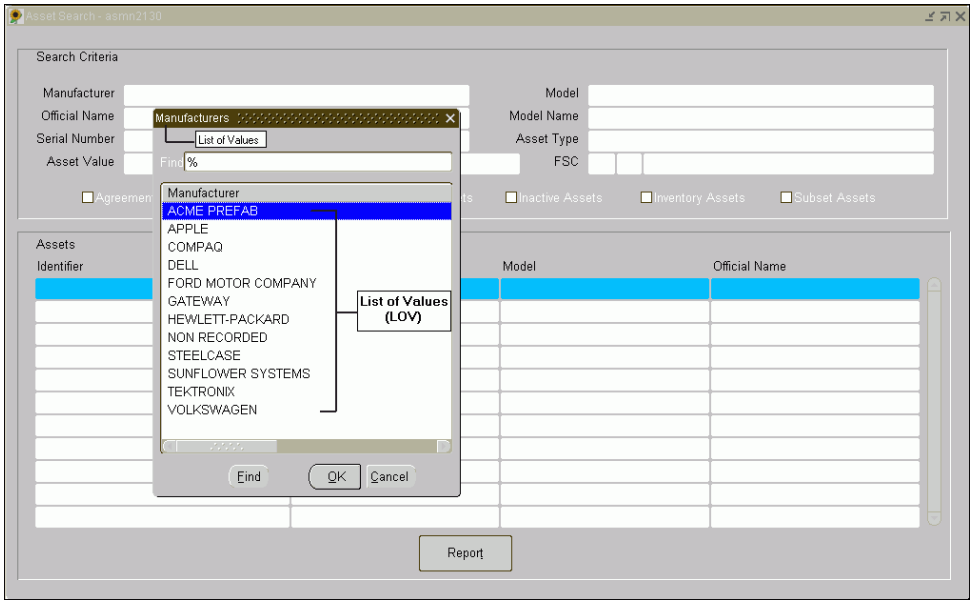


Figure 3-9: List of Values and Wildcard Search Techniques

The best way to explain this concept is by example. The following demonstrations illustrate the wildcard concept.

Perform a search for inventory assets manufactured by *APPLE*. You will use wildcards to search for this manufacturer using the three methods described above.

PERFORM A % WILD CARD SEARCH

Use **%** to return a complete List of Values (LOV).

NOTE: A blank field or a field with % entered returns **all** available items.

NAVIGATION

- **Click Mgmt**
- **Click Asset Search**
- **Manufacturer = Blank or %**
- **Double-click to view**

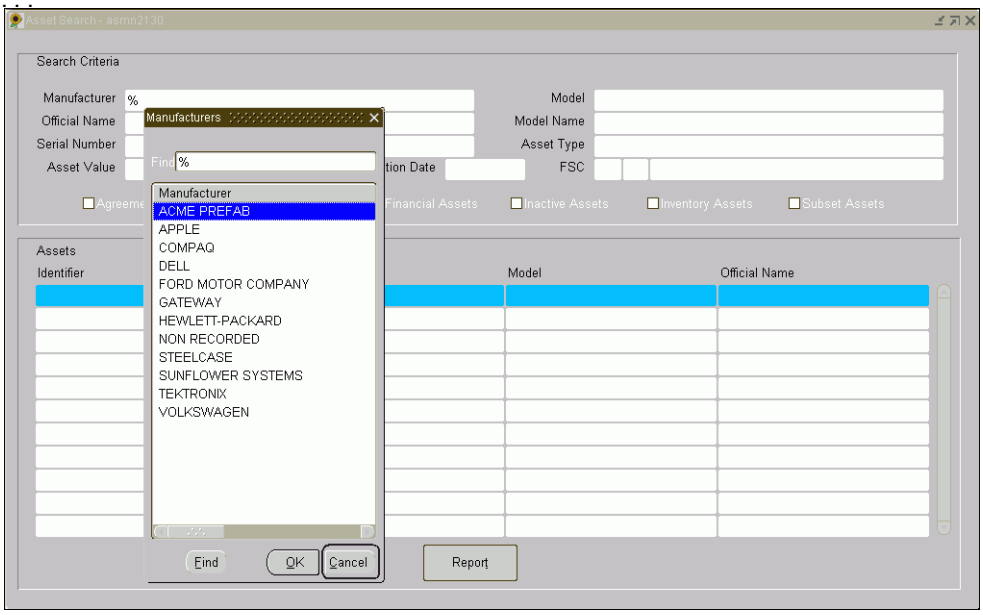


Figure 3-10: Performing a Wildcard Search

Step 1. Navigate to the **Asset Search** screen.

Step 2. Double-click in the **Manufacturer** field (**%** will default) to view the returned list of values.

Click the **List** icon to view the returned list of values.

Step 3. Click the **Cancel** button to discard retrieved results and close the LOV.

USE CHARACTER + % WILDCARD SEARCH

Continue from the previous example.

NAVIGATION

- **Click Mgmt**
- **Click Asset Search**
- **Manufacturer = A%**
- **Double-click to view**

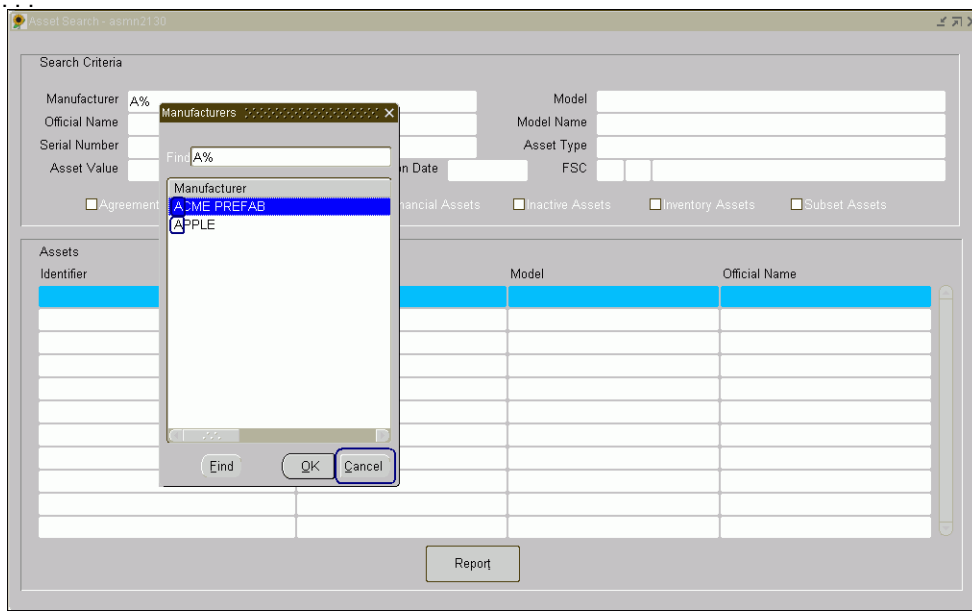


Figure 3-11: Character Plus Wildcard Searches

Step 1. Navigate to the **Asset Search** screen.

Step 2. Double-click in the **Manufacturer** field and enter **A%** in the **Manufacturer** field.

Step 3. Double-click to view the returned list of values.

NOTE: Only those words that start with the character *A* are displayed.

Step 4. Click the **Cancel** button.

Step 5. Click the **Clear All** icon to clear the form.

NOTE: The **Report** button is a shortcut to Reports within Sunflower applications. In order to use this feature you may need to disable Internet Explorer's "Pop-up Blocker" feature, as shown below:

Step 1. On the Internet Explorer Menu Bar select **Tools** > **Internet Options...**.

Step 2. Click the **Privacy** tab.

Step 3. Uncheck **Block pop-ups**.

Step 4. Click the **Apply** button.

Step 5. Click the **OK** button.

Continuing from the previous walkthru

Step 1. Enter **%A** in the **Manufacturer** field.

Step 2. Double-click to view the returned list of values.

NAVIGATION

- **Click Mgmt**
- **Click Asset Search**
- **Manufacturer = %A**
- **Double-click to view**

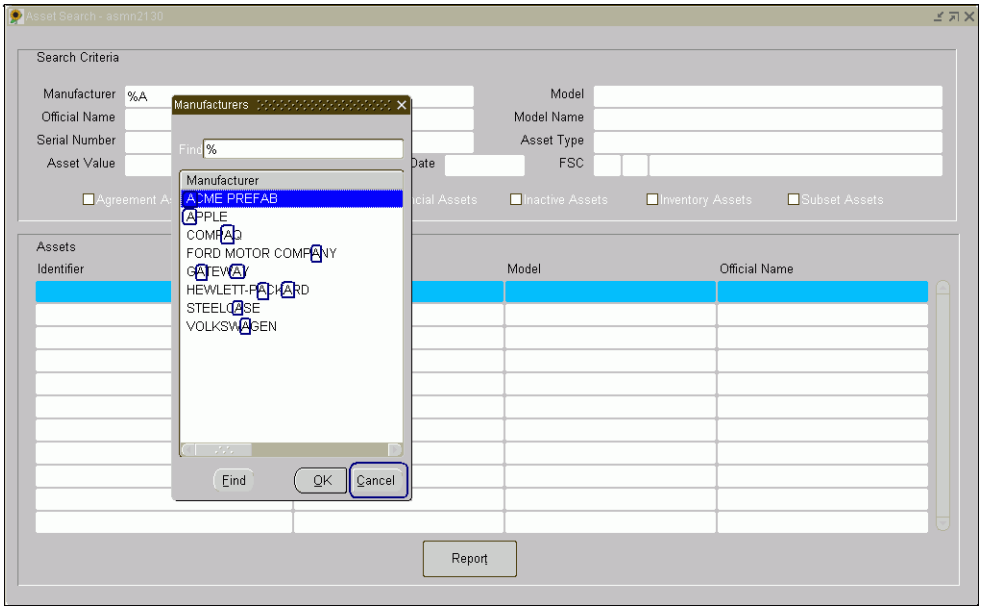


Figure 3-12: Other Variations on Wildcard Searches

NOTE: Only those words that contain the character *A* *anywhere* in the name are displayed.

UNIQUE IDENTIFIER SEARCH AND REPORTING TECHNIQUES

Sunflower has many functions that enable you to search for and retrieve asset records. You can further refine your search techniques by using the **Unique Identifier** (**UID**) field as a search parameter within screens and reports.

This section illustrates how to use:

- **Unique Identifier** as Search Criteria
- Reporting Criteria
    - "Inventory Assets (Global Information) Report and User-Defined Fields"
    - "Inventory Assets History Report and the Unique Identifier"

USE THE UNIQUE IDENTIFIER AS SEARCH CRITERIA

Searching for assets is a common task performed with Sunflower applications and there are many ways in which you can search for data. The **Query Criteria** screen is a common search tool that is accessible from most screens. The **Unique Identifier** has been added as a search element that enhances Sunflower's search capabilities. For more information about the Unique Identifier, see the Sunflower Assets User Guide.

Scenario: The following graphic illustrates how to use the **Unique Identifier field** on the **Query Criteria** screen.

NAVIGATION

- **Click Mgmt**
- **Click Inventory Asset Summary and History**
- **Click the Find icon**

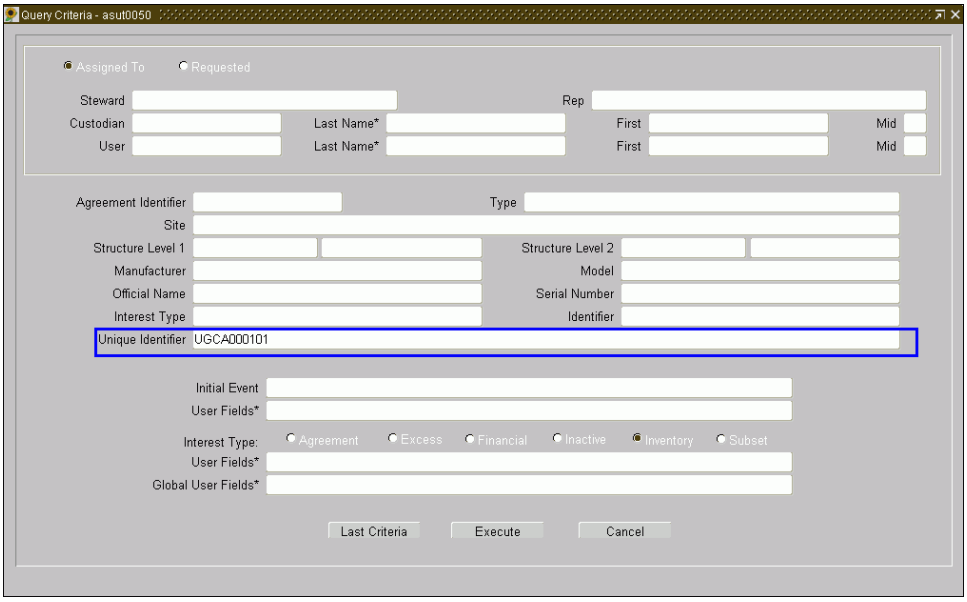


Figure 3-13: Unique Identifier as Search Criteria

INVENTORY ASSETS (GLOBAL INFORMATION) REPORT AND USER-DEFINED FIELDS

Sunflower enables you to further refine reporting capabilities by using the **User-Defined Fields** (**UDF**) and the **Unique Identifier** (UID) field as report parameter criteria. Recall from the previous discussion on UID (“Use the Unique Identifier as Search Criteria” on page 62) that you can use either the UID or the asset identifier to retrieve an asset record when searching from a specific screen. The following example shows you how to use a user-defined field to build a report for an asset specific to a purchase order (PO) and PO line item:

ACCESS REPORTS

Use one of the following options to access the **Inventory Assets (Global Information)** report.

Option 1: From Sunflower Enterprise:

Step 1. Select the **Management** menu.

Step 2. Select **Management Reports**.

Step 3. Click the **Inventory Assets (Global Information)** report hyperlink.

Option 2: From the Sunflower Enterprise Production Screen:

Step 1. Select the **Reports** menu select **Management Reports**.

Step 2. Click the **Inventory Assets (Global Information)** report hyperlink.

Step 3. Select **Management Reports**.

Step 4. Click the **Inventory Asset (Global Information)** report hyperlink.

Scenario: The following graphic illustrates how to view the key areas and fields of the report parameter page for the **Inventory Assets (Global Information)** report that builds a report using the UDF selection criteria. Generate a report by performing the steps below.

Step 1. Enter and select report criteria on the **Report Parameter** page.

To return asset data for a specific line item on a given PO, select the **Asset Initial Event** field and click the **List of Asset Initial Event** button to open the **Asset Initial Event** condition dialog box.

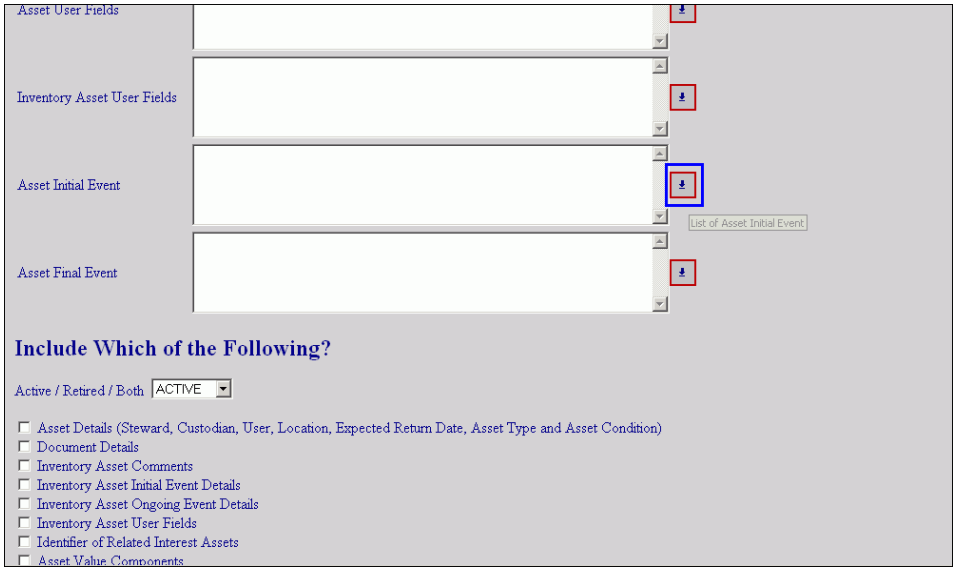


Figure 3-14: Using Asset Initial Event on the Report Parameter Page

Step 2. Define the **Asset Initial Event** criteria.

a. Enter a '1' for the Condition Group (1) field.

b. Select *Purchase Order* for the Attribute (2) column.

c. Select '=' for the Operator.

d. Enter the number of the PO, in this case *PO12*, in the Value column.

e. Click the Tab button on your keyboard to move your cursor to the next row.

f. Enter a '1' for the Condition Group (1) field.

g. Select *Purchase Order Line* for the Attribute (2) column.

h. Select '=' for the Operator.

i. Enter the number of the PO line item, in this case PO line item '1'in the Value column.

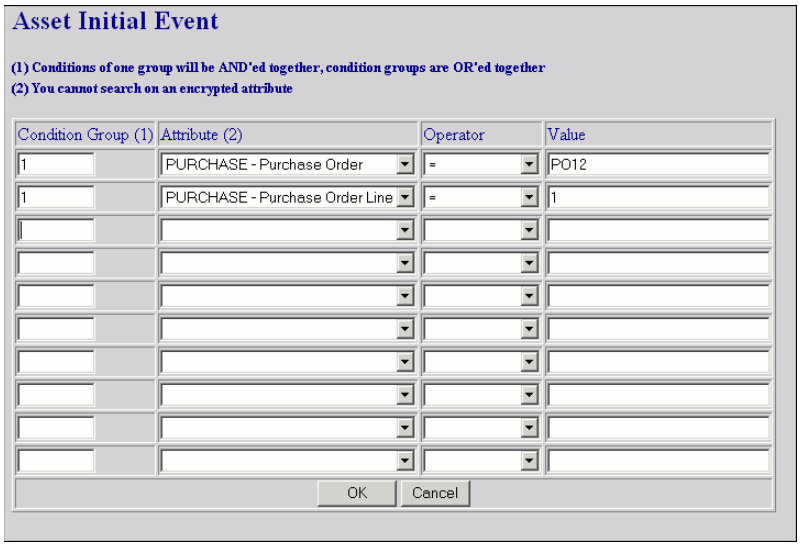


Figure 3-15: Report Parameter Conditional Dialog Setup

Step 3. Click **OK**.

The Report Parameter page displays the conditional script that was built.

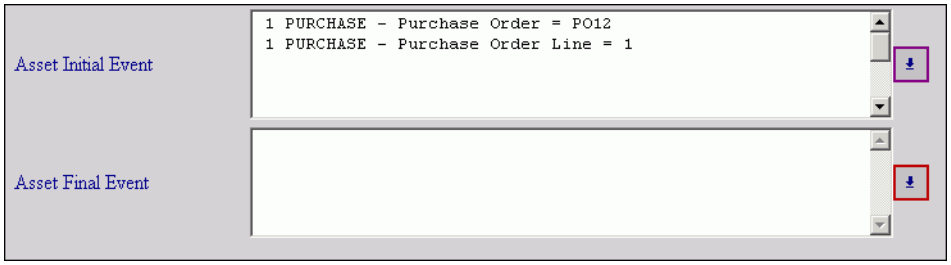


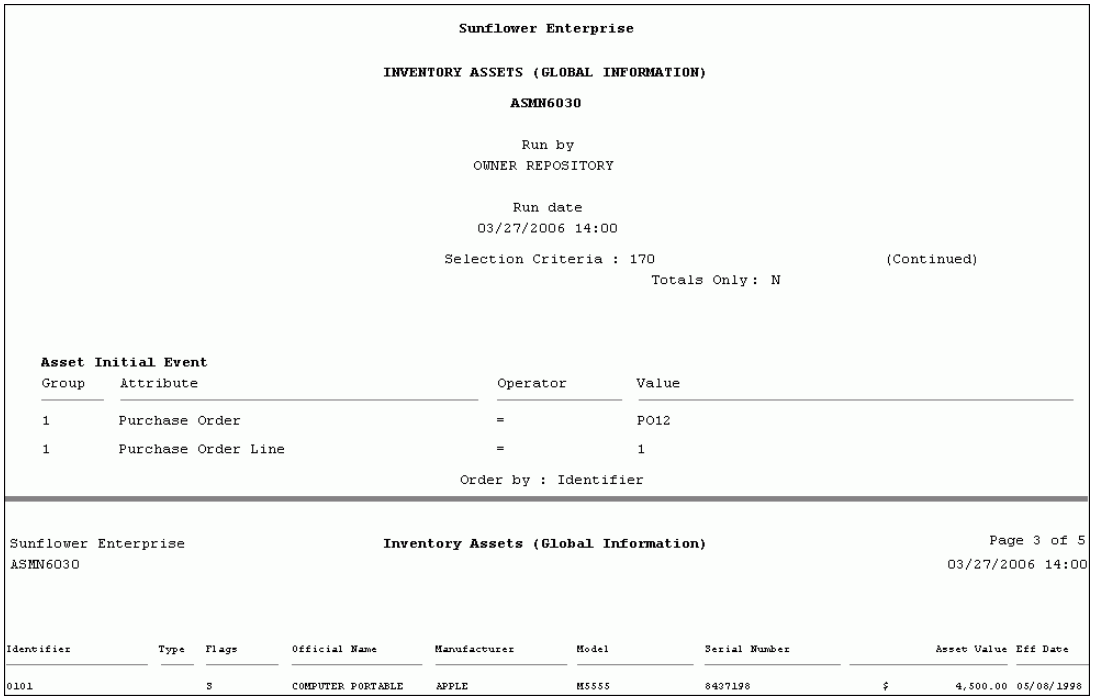
Figure 3-16: Asset Initial Event User Field Criteria

Step 4. Click the **Submit** button once you have all of the report parameters you require.

Step 5. Select a **Report Output** such as **ACROBAT** to review the report as a PDF file.

Step 6. Click **EXECUTE**.

Step 7. View the output.



Sunflower Enterprise

INVENTORY ASSETS (GLOBAL INFORMATION)

ASMN6030

Run by
OWNER REPOSITORY

Run date
03/27/2006 14:00

Selection Criteria : 170 (Continued)
Totals Only: N

Asset Initial Event

Group	Attribute	Operator	Value
1	Purchase Order	=	PO12
1	Purchase Order Line	=	1

Order by : Identifier

Sunflower Enterprise — **Inventory Assets (Global Information)** — Page 3 of 5
ASMN6030 — 03/27/2006 14:00

Identifier	Type	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Eff Date
0101		S	COMPUTER PORTABLE	APPLE	M5555	8437198	$ 4,500.00	05/08/1998

Figure 3-17: Inventory Assets (Global Information)

INVENTORY ASSETS HISTORY REPORT AND THE UNIQUE IDENTIFIER

Sunflower provides the **Unique Identifier** (UID) field for use on several screens such as the asset maintenance screens (e.g. **Maintain Inventory Assets**, **Maintain Inactive Assets**, **Maintain Agreement Assets**, etc.). You can use the UID interchangeably with the asset identifier as a report parameter. For example, if you have an asset for which you want to determine the ownership but the asset identifier tag is missing, you can use the UID as a report parameter in place of the asset identifier to search for and retrieve the asset record. Access Reports.

The **Inventory Assets History** report shows the detailed changes for inventory assets. The following example illustrates how you can use the **Inventory Asset History** report in conjunction with the **Unique Identifier** (UID) field to obtain information about an inventory asset's associated properties.

Use one of the following options to access the **Inventory Assets (Global Information)** report.

Option 1: From Sunflower Enterprise Forms:

Step 1. Select the **Management** menu.

Step 2. Select **Management Reports**.

Step 3. Click the **Inventory Asset History report** hyperlink.

Option 2: From the Sunflower Enterprise Production Screen:

Step 1. Select the **Reports** menu select **Management Reports**.

Step 2. Click the **Inventory Assets (Global Information)** report hyperlink.

Step 3. Select **Management Reports**.

Step 4. Click the **Inventory Asset History** report hyperlink.

Scenario: The following graphic illustrates how to use a UID number as search criteria on a report parameter page to determine the ownership of the asset. An asset seems to be out of place. You want to verify the ownership and proper location for the asset. The asset identifier is illegible, however, the UID tag number is legible. Using the UID number, access the Sunflower application and enter the UID number as a part of your report selection criteria on the Inventory Asset History report to obtain the details of the asset record. Generate a report by performing the steps below.

Step 1. Enter the UID in the **Identifier** field on the **Report Parameter** page.

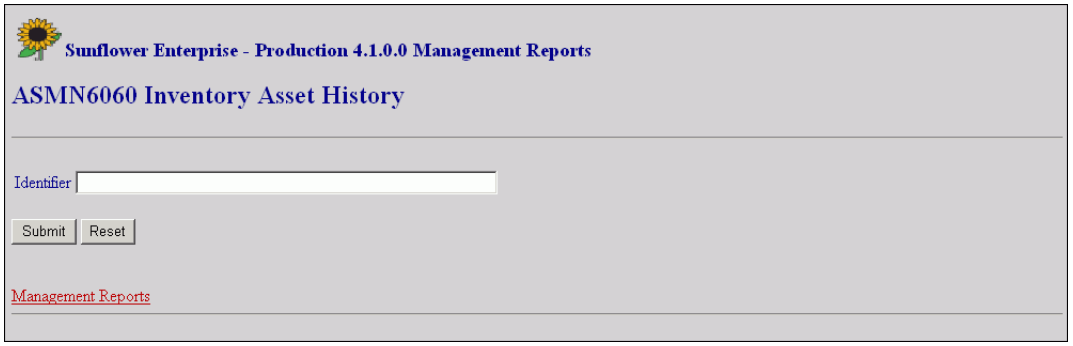


Figure 3-18: Using the UID as the Asset Identifier

Step 2. Verify that the UID number returns the asset's identifier value to the report parameter selection criteria.

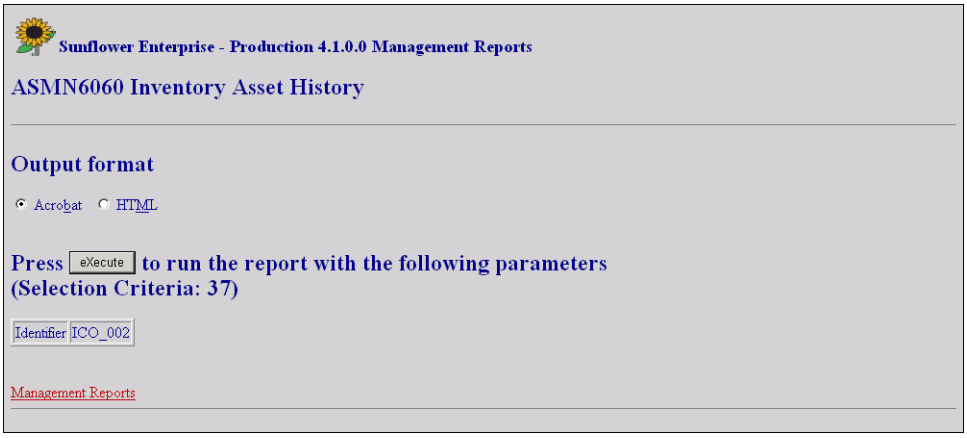


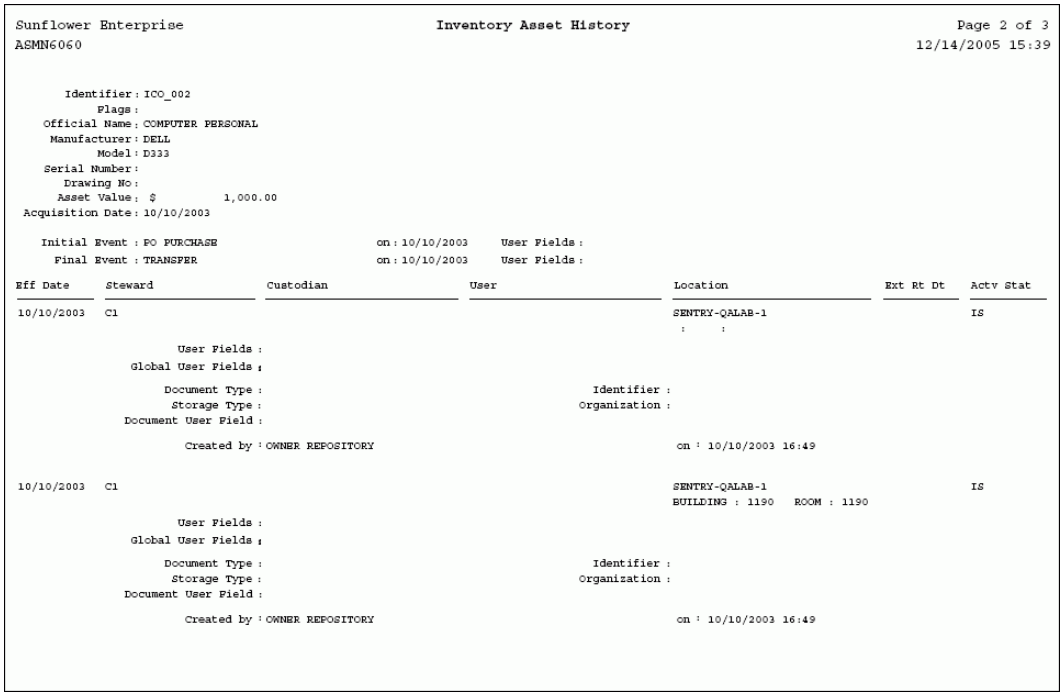
Figure 3-19: UID Returns the Asset Identifier Value

Step 3. Click the **Submit** button.

Step 4. Select a **Report Output** such as **ACROBAT** to review the report as a PDF file.

Step 5. Click **EXECUTE**.

Step 6. View the output.



Sunflower Enterprise — Inventory Asset History — Page 2 of 3
ASMN6060 — 12/14/2005 15:39

Identifier : ICO_002
Flags :
Official Name : COMPUTER PERSONAL
Manufacturer : DELL
Model : D333
Serial Number :
Drawing No :
Asset Value : $ 1,000.00
Acquisition Date : 10/10/2003

Initial Event : PO PURCHASE on : 10/10/2003 User Fields :
Final Event : TRANSFER on : 10/10/2003 User Fields :

Eff Date	Steward	Custodian	User	Location	Ext Rt Dt	Actv Stat
10/10/2003	C1			SENTRY-QALAB-1 : :		IS
	User Fields :					
	Global User Fields :					
	Document Type :		Identifier :			
	Storage Type :		Organization :			
	Document User Field :					
	Created by : OWNER REPOSITORY			on : 10/10/2003 16:49		
10/10/2003	C1			SENTRY-QALAB-1 BUILDING : 1190 ROOM : 1190		IS
	User Fields :					
	Global User Fields :					
	Document Type :		Identifier :			
	Storage Type :		Organization :			
	Document User Field :					
	Created by : OWNER REPOSITORY			on : 10/10/2003 16:49		

Figure 3-20: Inventory Asset History Report Output

COMPLEX FIELDS

A **Complex Field** is a grouping of related fields that are displayed in the form of a pop-up window due to their tight association with one another. Common complex fields are **Location**, **Document**, **Names**, **Catalog**, and **User Fields**. For example, **Location** is a combination of several fields that include **Site**, **Building**, **Room** etc. All complex fields are represented by their name followed by an asterisk (*****).

DEFINE A COMPLEX FIELD

Scenario: The following graphic illustrates how to define a location complex field.

NAVIGATION

- **Click Mgmt**
- **Click Maintain Inventory Assets**
- **Enter asset Identifier**
- **Click the Tab key**
- **Double-click in the Location* field**

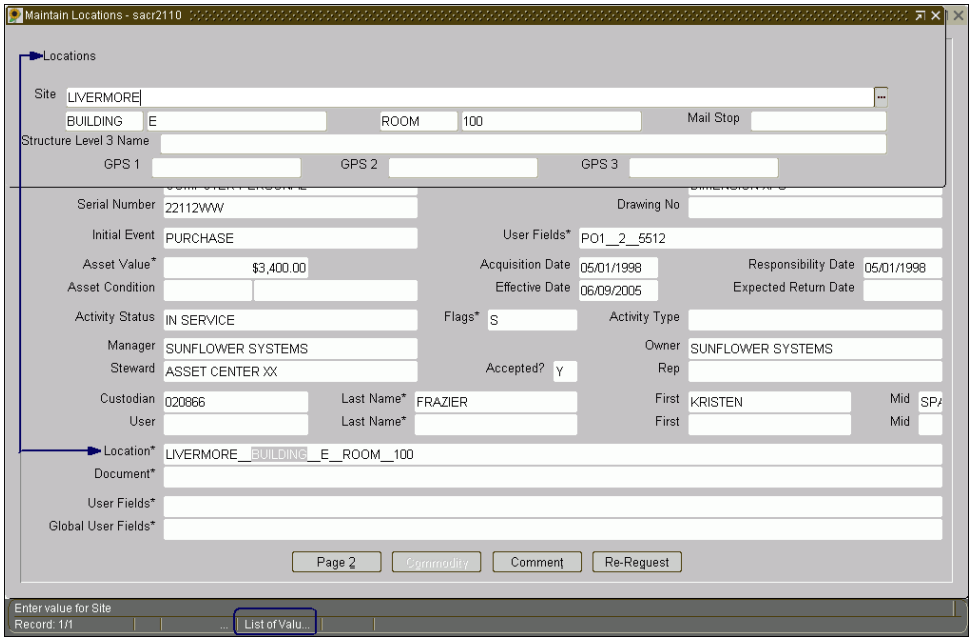


Figure 3-21: Defining Complex Fields

Step 1. Navigate to the **Maintain Inventory Assets** screen.

Step 2. Enter the asset identifier in the **Identifier** field. *XX02*. Click the Tab key.

Step 3. With the cursor in the **Location** field, double-click to display the location information. **Location** is a complex field.

Step 4. Edit the fields that make up the **Location** complex field by double clicking in each field and selecting from the choices available.

> **NOTE: Structure Level 3 Name**, **GPS1**, **GPS2** and **GPS3** of the **Location** complex field are free form text fields. You can edit these fields by typing in the values.

Step 5. Click the **Save** icon. Saving automatically closes the complex window.

Step 6. Click the **Exit** icon or **X** located in the upper right corner of the pop-up window to exit without saving.

4

Core Assets

Sunflower uses the concept of core assets to capture information that applies to all assets. Core assets contain information about an asset that is true regardless of the type of asset or phase of the asset lifecycle. For example, information relevant to all assets such as manufacturer, model name, serial number and asset value is relevant to any asset record regardless of the asset interest type that you are working with within Sunflower applications.

Key Concepts

This chapter includes the following discussion points and concepts:

- "Core Assets"
- "Interest Assets"
- "Core Assets versus Interest Assets"

ABOUT CORE ASSETS

Every asset has properties that define and distinguish it from other assets. Sunflower uses core assets to address these properties.

CORE ASSET FIELDS

In the process of creating an asset, core asset properties are defined. You can create and maintain core asset properties from any number of asset maintenance screens (e.g. **Maintain Inventory Assets**, **Maintain Agreement Assets**, etc.) or when creating an asset from a purchase order (e.g. **Process Inventory Asset**, **PO Interface Records**).

Core asset properties (fields) include the following:

• Acquisition Date	• Documents	• Manager
• Activity Type	• Drawing Number	• Owner
• Asset Value	• Effective Date	• Responsibility Begin Date
• Catalog	• Final Event	• Serial Number
• Comment, Attachments, Pictures	• Flags	• Steward
• Custodian	• Initial Event	• Unique Identifier
• Default Location	• Location	• User

Certain properties noted above will rarely change once you define them (e.g. **Serial Number**, **Drawing Number**, **Acquisition Date**, **Catalog** and **Unique Identifier**). However, other fields such as **Manager**, **Custodian**, **User**, and **Location** may change many times throughout an asset's lifecycle. When a core asset property change occurs, Sunflower captures the current and historical values of the affected properties in a comprehensive history table.

INTEREST ASSETS

In each phase of the asset lifecycle, assets acquire information from different business functions. Interest assets are the mechanism Sunflower uses to capture that business function specific information.

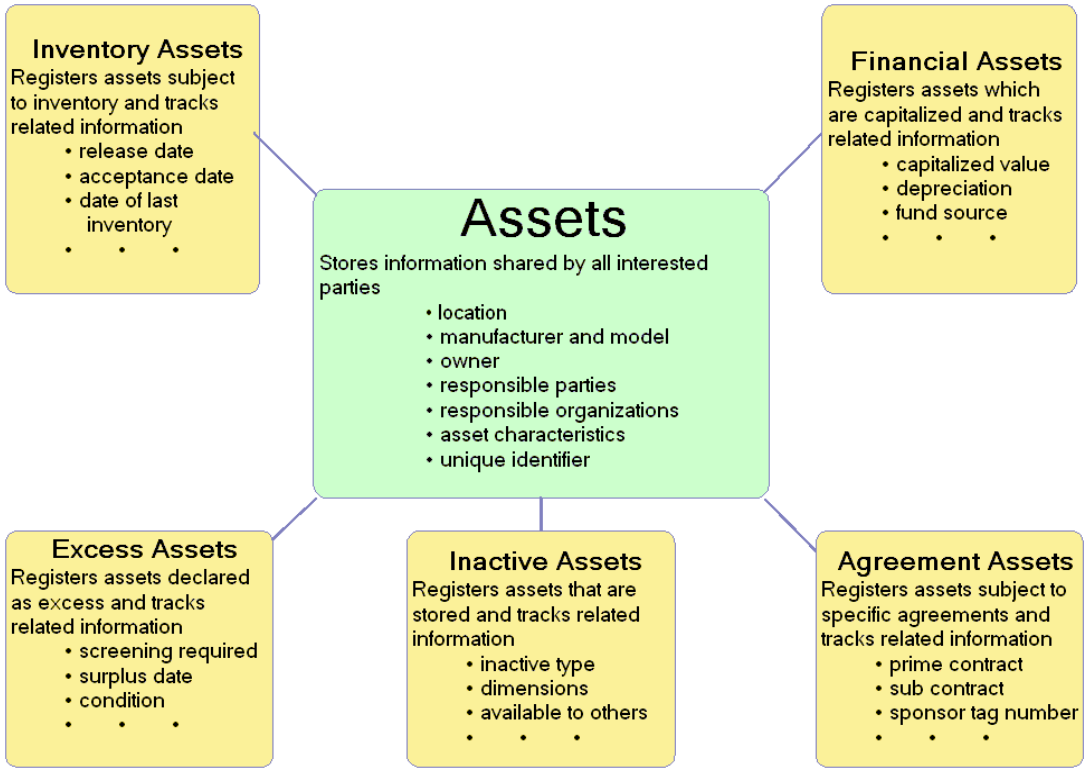


Figure 4-1: Interest Assets

Unlike core asset properties, you can change the interest asset specific proprieties of an asset without affecting the other interest assets.

NOTE: Sunflower Contract Reports manages Agreement Asset interest types. Sunflower Sentry manages Inventory Asset interest types. The Personal Asset Provisioning feature manges Inactive and Inventory Asset interest types.

CORE ASSETS VERSUS INTEREST ASSETS

The following discussion highlights how the interest asset properties reflect the status change to an asset when the asset is sent from inventory to excess. In addition, this section illustrates how you can track changes to the core asset properties that occur when converting the asset from an inventory asset to an excess asset by using the **Asset Summary and History** screens.

Scenario: The following graphic illustrates how to distinguish the difference between core asset and interest asset information and how core assets capture the history of an asset for the changes that occur during an asset's lifecycle.

NAVIGATION

- **Click Inventory**
- **Click Inventory Asset Summary and History**

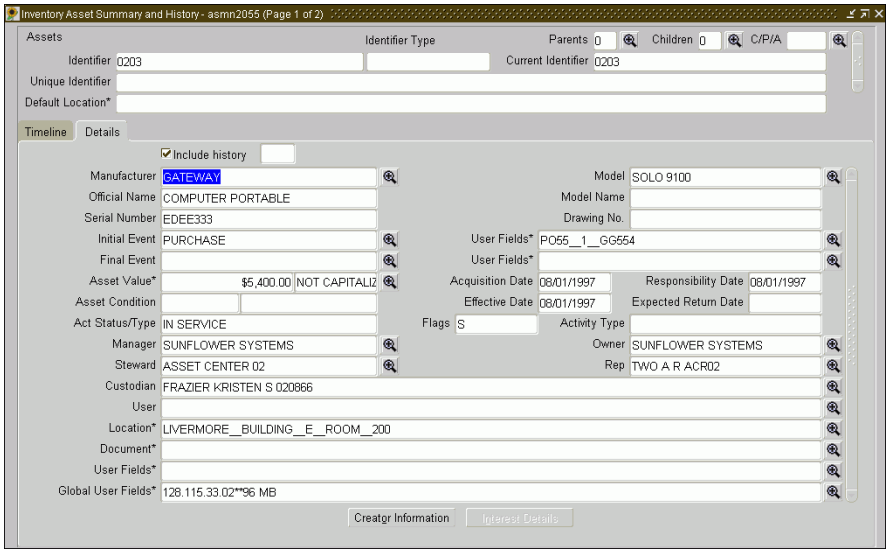


Figure 4-2: Inventory Asset Summary and History Screen

Step 1. Determine the asset you want to excess. In this case, the inventory asset with the **Asset Identifier**, *0203*.

Step 2. Use the Excess module to set up the asset for excess. It's a good practice to append a prefix or suffix to your original **inventory asset Identifier** and use that as the **Excess Asset Identifier**. For example, *EX0203*.

When you enter the **Maintain Excess Assets** screen, the fields are populated with system default values. Many of the core asset fields are blank until you specify the content. In most cases, you will create excess assets from existing inventory assets but it is possible to create an excess asset directly. In the case of legacy data, you can create excess assets from an existing system by migrating the data directly into Sunflower. Many of the fields on the **Maintain Excess Assets** screen are the same as the **Maintain Inventory Assets** screen. Several of these fields are the core asset fields listed earlier in the core assets discussion. For more information about core asset fields, see “Core Asset Fields” on page 74.

Scenario: The following graphic illustrates how to distinguish the difference between core asset and interest asset information and how core asset information captures the history of an asset for the changes that occur during an asset’s lifecycle.

NAVIGATION

- **Click Excess**
- **Click Maintain Excess Assets**

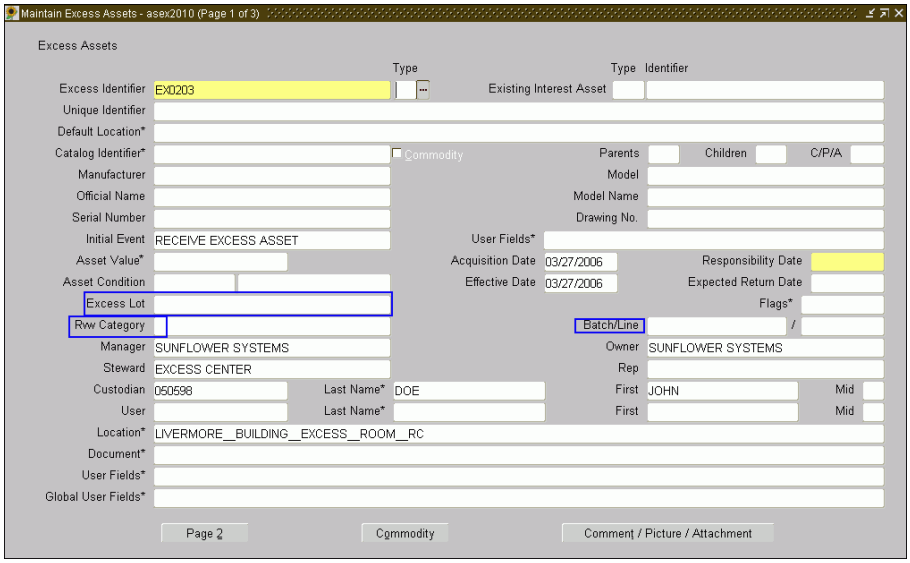


Figure 4-3: Maintain Excess Assets Screen Before Updating

Step 1. Using the **Existing Interest Asset** field, enter the *INV* code for Inventory Asset, and enter the original *0203* **Inventory Asset Identifier**.

Several of the core asset fields are now populated with the *0203* inventory asset information.

Step 2. Update any fields that require new information for the excess asset.

Many of the core asset fields such as **Manufacturer**, **Model**, **Serial Number** and **Acquisition Date** will not change. The information for these core asset fields typically persists throughout the asset's lifecycle. However, now that you are excessing the asset, you may want to update the asset record with a new set of core asset Values (e.g. **Asset Initial Event**, **Steward**, **Custodian**, **Location**, **Effective Date** etc.).

NAVIGATION

- **Click Excess**
- **Click Maintain Excess Assets**

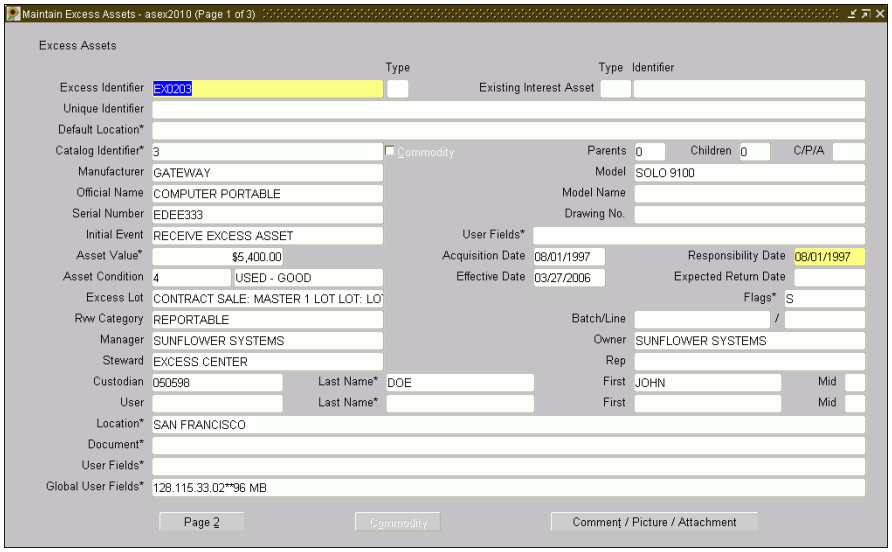


Figure 4-4: Maintain Excess Assets Screen After Updating

Step 1. Update any excess asset specific fields (e.g. **Excess Lot, Review Category,** etc.).

Step 2. Click the **Save** icon to save the record.

Review the information for the excessed asset by entering the excess asset identifier on the **Maintain Excess Asset** screen. You will notice that the **Asset Initial Event** has changed to ***Receive Excess Asset***. This is an example of a core asset property that changes as the asset moves through the asset lifecycle.

Core asset information is reflected throughout the application regardless of the module (interest asset) from which you view the information. To demonstrate how the core asset properties are reflected in any interest asset, review the history of the inventory asset record, *0203,* by using the **Inventory Asset Summary and History** screen and query for that specific asset identifier. The following examples illustrate the current and historical asset records for the *0203* inventory asset record.

NAVIGATION

- **Click Mgmt**
- **Click Inventory Asset Summary and History**

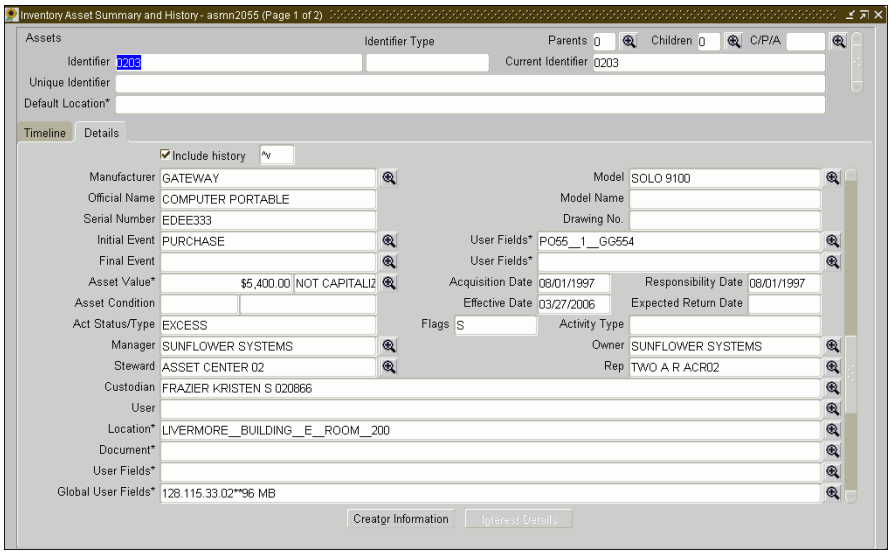


Figure 4-5: Inventory Asset Historical Record

Step 1. Navigate to the **Inventory Asset Summary and History** screen.

Step 2. Check the Include History checkbox.

Step 3. Enter the asset identifier, *0203,* and click the Tab key.

Step 4. Scroll through the history records to view the current and historical asset record information.

Use the **Next Record** icon to view the previous asset state for the inventory asset, *0203.* The figure below is the historical record for the inventory asset, *0203*:

NAVIGATION

- **Click Mgmt**
- **Click Inventory Asset Summary and History**

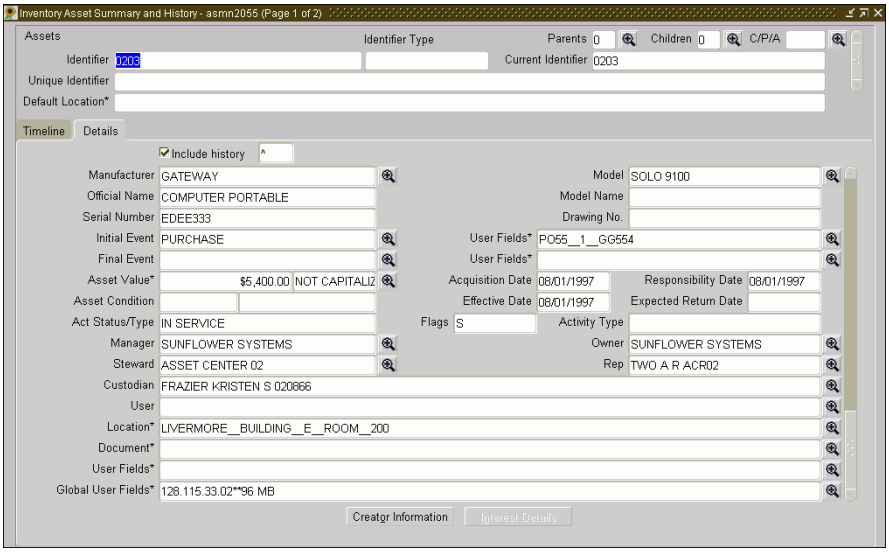


Figure 4-6: Inventory Asset Historical Asset Record

Notice, the change of **Status**, **Steward**, **Custodian**, and **Location** compared to current asset record in Figure 4-5. Sunflower captures information from each stage of the asset's lifecycle.

There are business process specific fields for each type of interest asset. To view the business process specific fields, use a module (interest asset) specific **Asset Summary and History** screen and click the **Interest Details** button to reveal the block of information that is specific to that business function's interest asset properties. The following figures illustrate how to view this information.

NAVIGATION

- **Click Excess**
- **Click Excess Asset Summary and History**
- **Click the Interest Details button**

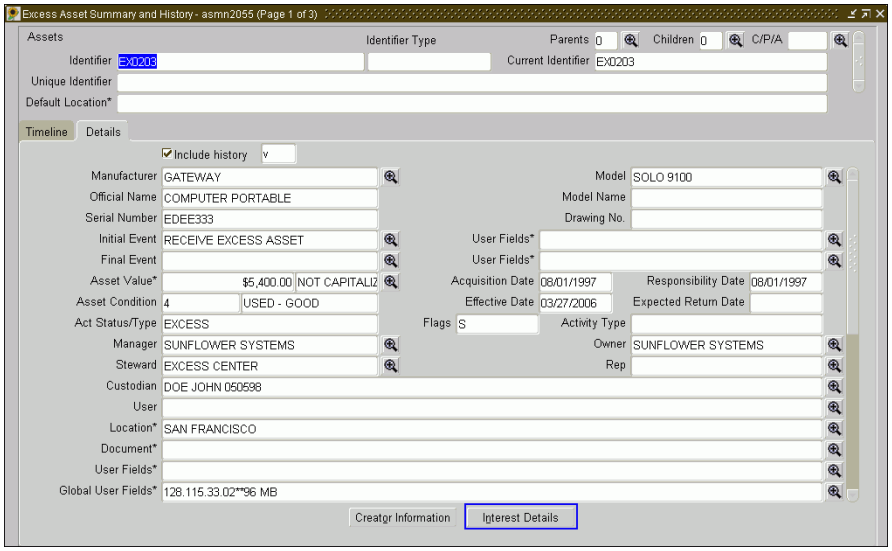


Figure 4-7: Asset Summary and History Interest Details

Clicking the **Interest Details** button reveals the excess interest asset information:

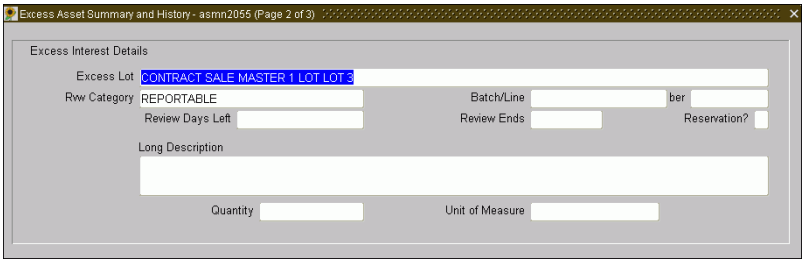


Figure 4-8: Asset Summary and History Excess Interest Details

5

Get Help

The Get Help chapter introduces you to the Sunflower online help system, other methods for getting support and tips for using your Sunflower application.

Key Concepts

This chapter includes the following discussion points and concepts:

- “Use Context Sensitive Help”
- “Search for Help Topics”
- “Access the Customer Care Website”
- “Education and Training”
- “Site Survey and Upgrade Support Services”

USE CONTEXT SENSITIVE HELP

Sunflower provides a comprehensive online help system that is accessible from your web browser. Click the **Help** icon or select **Help** from the Menu Bar to access the help system.

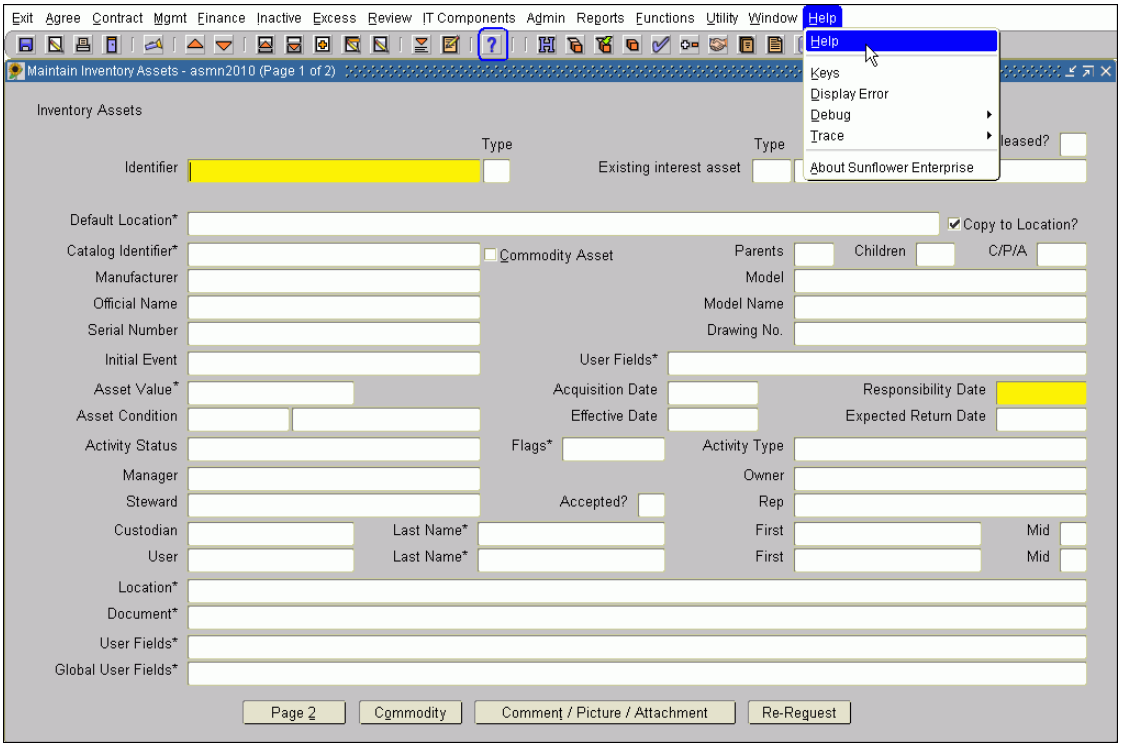


Figure 5-1: Online Help on the Tool Bar and Menu Bar

VIEW THE HELP TOPIC DISCUSSION

The Sunflower help system is context-sensitive and opens on the topic discussion that corresponds to your current screen. A brief description of your current screen appears along with a list of common tasks you can accomplish with the current screen. To receive step-by-step instructions about how to perform a task, simply click on the task and view the instructions.

Figure 5-2: Context-Sensitive Online Help

SEARCH FOR HELP TOPICS

Use the search function provided within the online help system when you know the activity you wish to perform, but do not know where to find the help topic discussion in the help system. Click the **Search** button on the Sunflower Main Help page to take you to the Online Help Search page.

Figure 5-3: Sunflower Main Online Help Page

Enter the task or key word of the task you wish to perform such as *steward* and click the **Search** button.

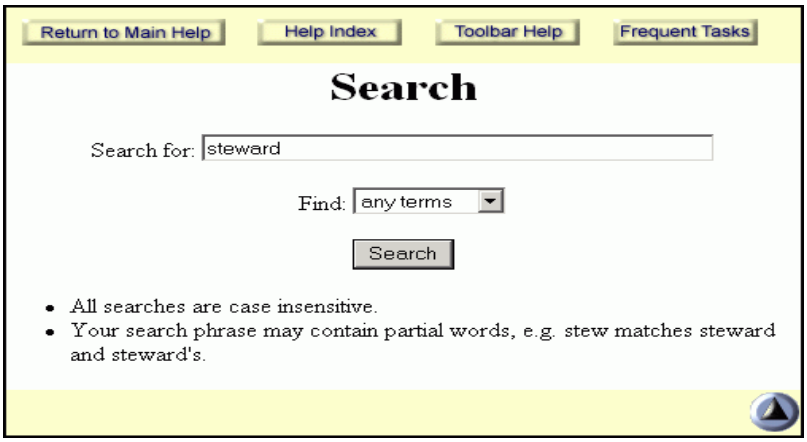


Figure 5-4: Online Help Search Dialog box for Sunflower

SEARCH RESULTS

Sunflower provides a list of all common tasks that match your search criteria. Select a task and click the respective hyperlink to view the help topic discussion.

Figure 5-5: Search Results

ACCESS THE CUSTOMER CARE WEBSITE

Another means of accessing support is through the Sunflower Systems **Customer Care** website. The Customer Care website includes:

- Documentation links (User Guides and Installation Guides)
- Downloads (Software/Hardware Patches and Technical Data)
- Resource Links (Support Resources)

ONLINE SUPPORT

Sunflower Systems online support gives you the tools to research and answer many of your questions through the Sunflower Systems Knowledge Base.

To access the Customer Care Website, use the following navigation:

Step 1. Access the Sunflower Systems home page at the following web address with your browser, **http://www.sunflowersystems.com/**.

1. Click the Customer Care link to access the Customer Care website login, **http://www.sunflowersystems.com/ccare/login/index.jsp**.

1. Only existing customers may access the Customer Care Website. Enter your user name (E-mail address) and password address and click **Enter**. If you are unable to access the Customer Care Website, please contact your organization's Sunflower System Administrator or Sunflower Systems Help at helpdesk@sunflowersystems.com.

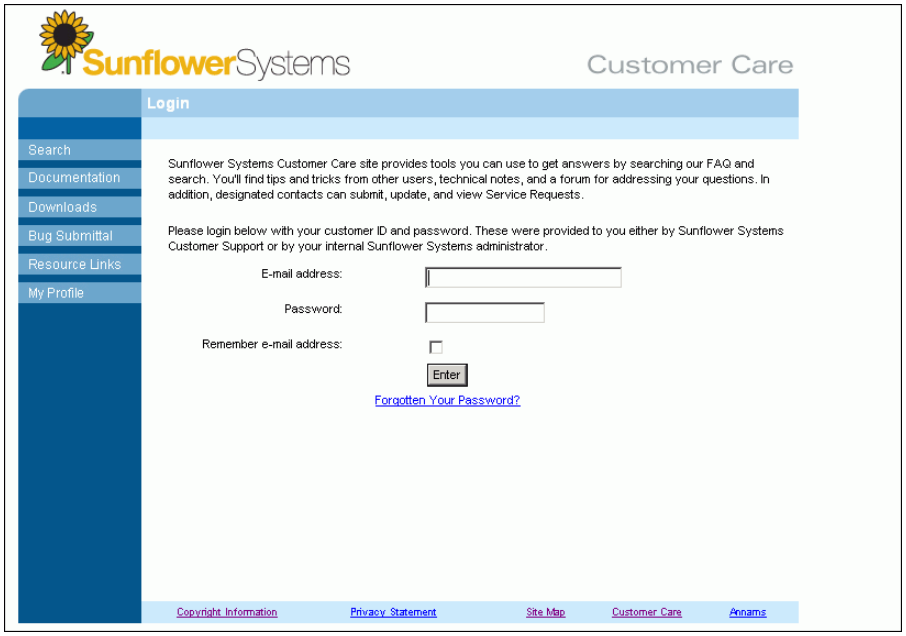


Figure 5-6: Sunflower Systems Customer Care Login Screen

If you have trouble locating what you are looking for, call Sunflower Systems Customer Support toll-free at 1-866-209-3516 or reach us by email at helpdesk@sunflowersystems.com.

Our Customer Care specialists are liaisons between users, product development, professional services, sales and marketing. Sunflower Systems depends on this communication flow to fully understand your needs and to ensure successful future product releases.

SUNFLOWER SYSTEMS DOCUMENTATION

To access documentation available on the Customer Care website, select the **Documentation** topic on the Customer Care page and click the link of the document that you want to view or download. Click the 'more' link to view all entries for a particular section. If you have any comments, concerns or issues regarding Sunflower Systems documentation, use the helpdesk Service Issue tracking system to log your specific items or reach us by email at helpdesk@sunflowersystems.com.

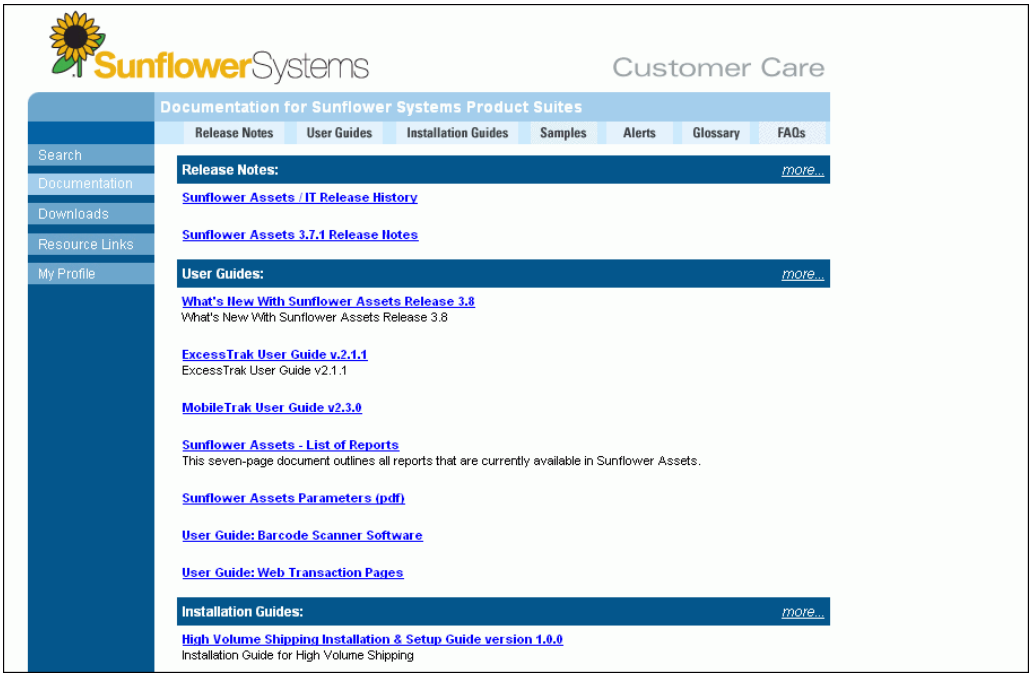


Figure 5-7: Sunflower Systems Customer Care Website Documentation

Click the link the of the desired document and an Adobe Acrobat PDF version of the document will display for viewing or to download and/or print.

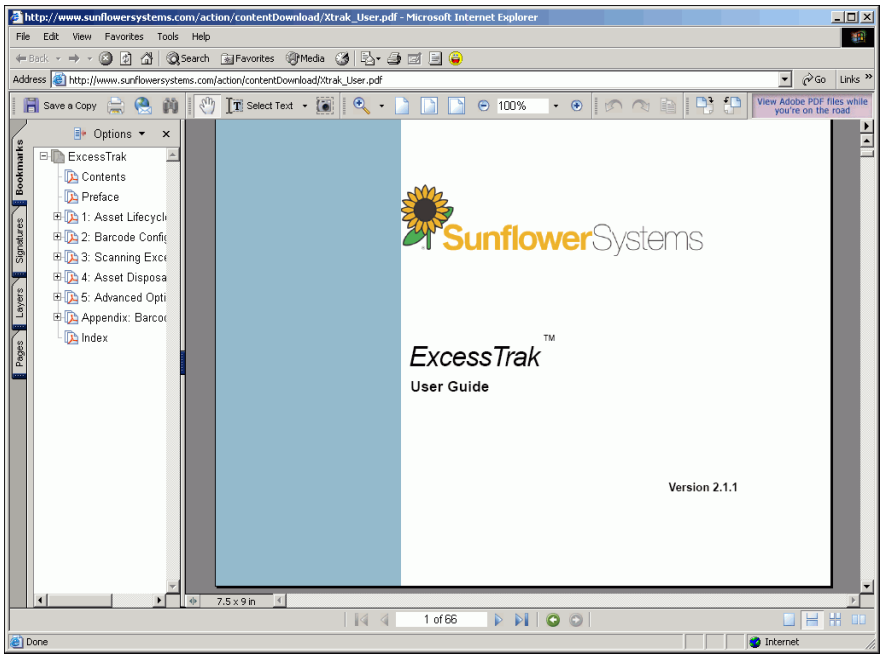
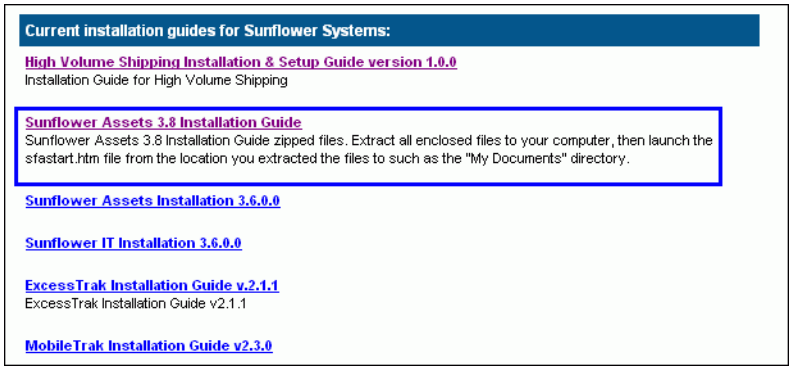


Figure 5-8: Adobe Acrobat PDF Document Download

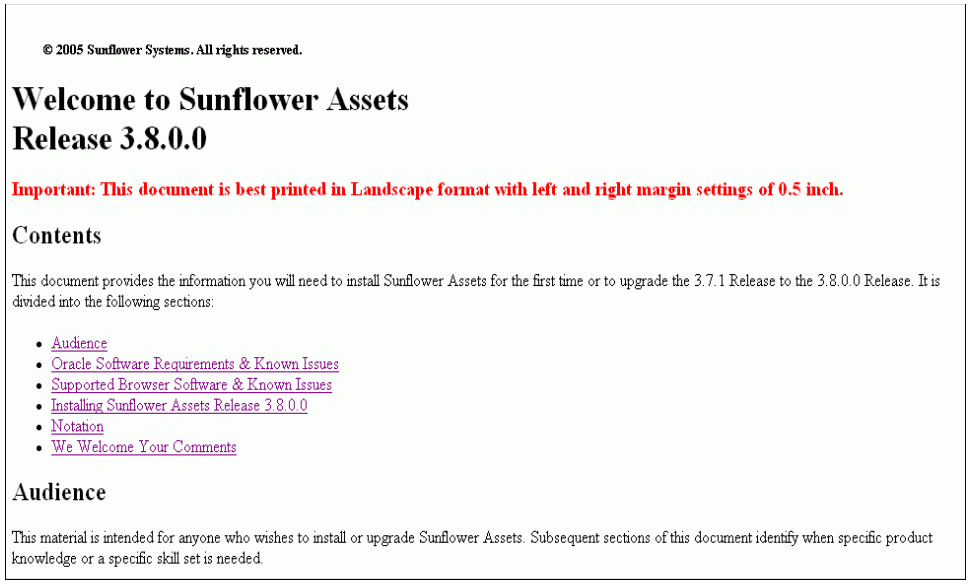
INSTALLATION GUIDES

You can access Sunflower Systems installation guides to assist you with your implementation at the **Customer Care** website, under the **Documentation** link. For example, access the Sunflower Assets 3.8 Installation Guide from the Customer Care Website:

Step 1. From the Customer Care Documentation page, click on the Sunflower Assets 3.8 Installation Guide link.



1. View or save Installation Guides on your computer.



ALERTS

Another resource on the Customer Care Website is the Documentation **Alerts** page. Click on the **Alerts** link to view discussions and scripts that impact Sunflower users. The Alerts contain information about product application work-arounds and scripts for optimizing the Sunflower user experience. You can subscribe to the automated Alert system by clicking on the subscription link and selecting the alert categories of interest.

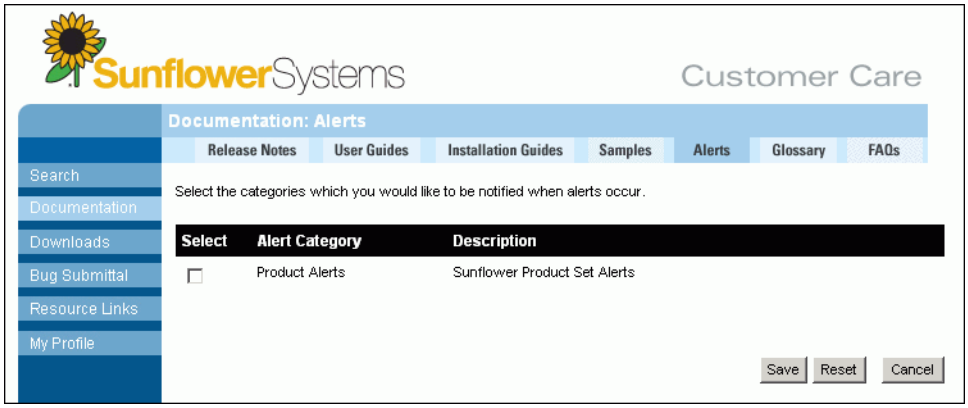


Figure 5-9: Documentation Alert Subscription Page

MY PROFILE

To keep in touch with the latest information and product application alerts, keep your contact information up-to-date with the **My Profile** page.

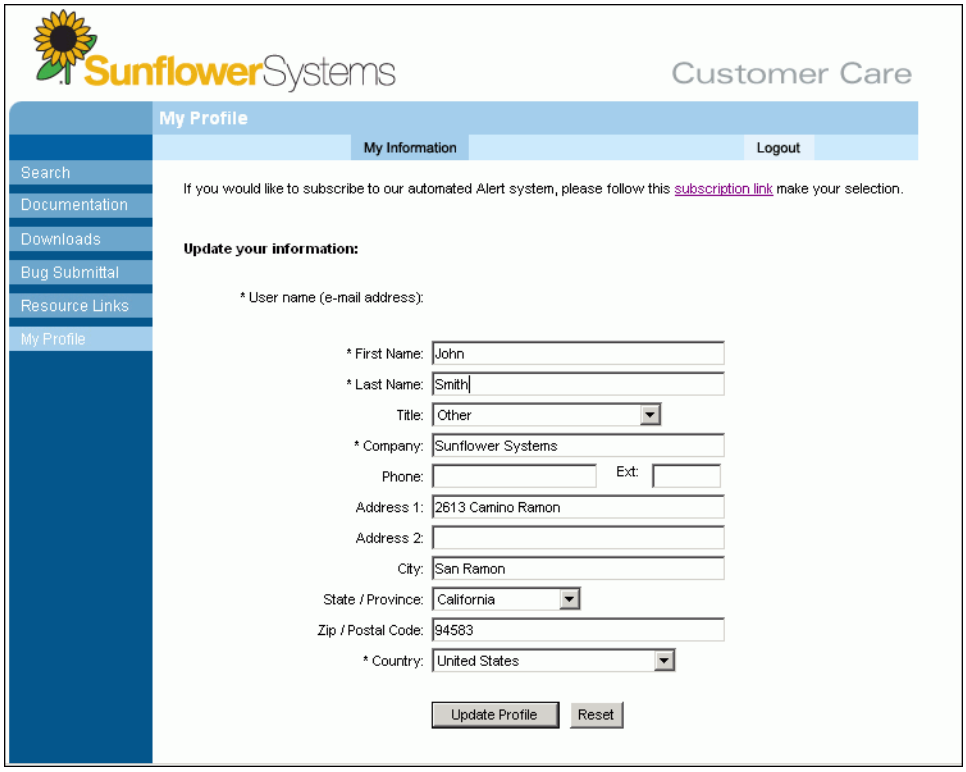


Figure 5-10: My Profile Page

PRODUCT DOWNLOADS AND PATCHES

You can use the **Product Download** resource on the Sunflower Systems Customer Care website to view and download the latest available software patches. Click the 'Downloads' link to access the Sunflower Systems Product Downloads page and select a desired hyperlink to begin the download process.

Figure 5-11: Product Down Loads and Patches Page

RESOURCE LINKS

In addition to the resources available from the Sunflower Systems Customer Care Website, you can use the **Resource Links** page to find numerous addition documents (internal and external) of interest covering organizations, regulations, security, publications and other resources that affect or relate to the Sunflower Enterprise product suite offering.

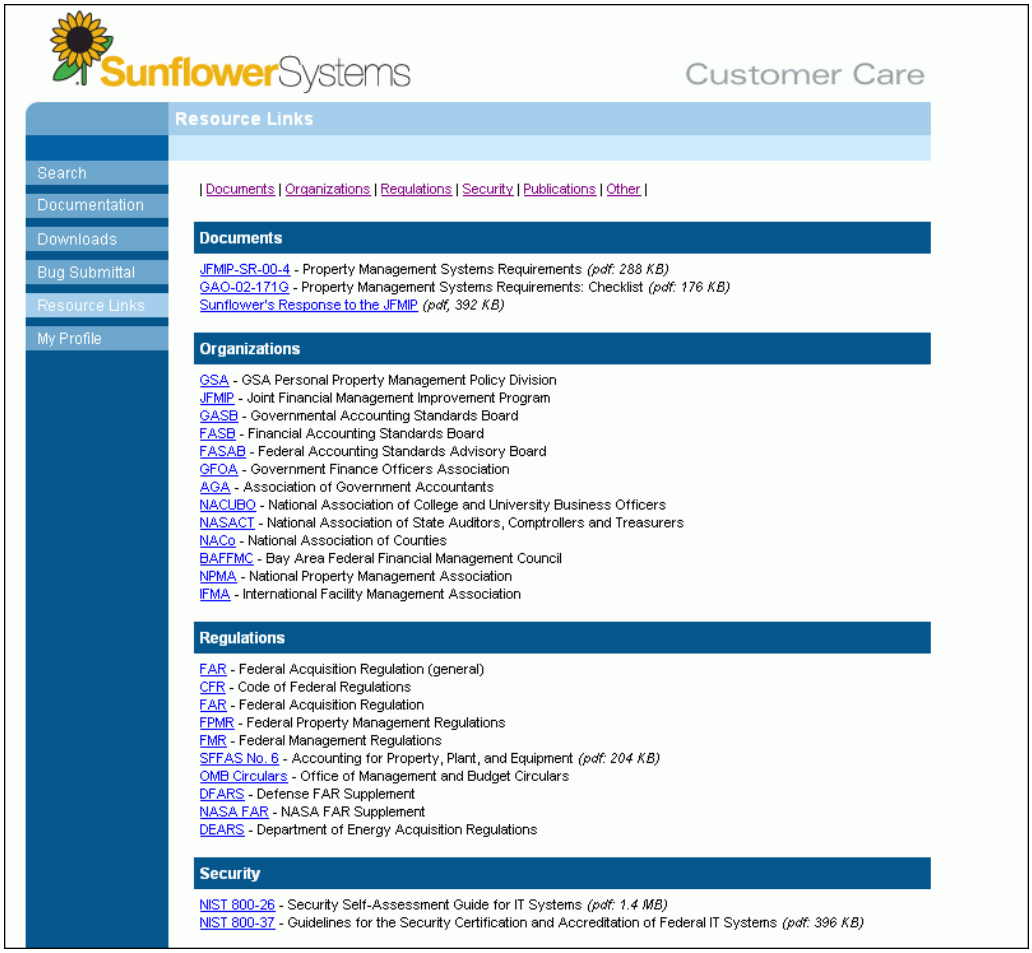


Figure 5-12: Resource Links Page

SUNFLOWER SYSTEMS USERS GROUP

The Sunflower Systems **Users Group** provides you with an opportunity to discuss common issues and resolutions that arise from the use of their applications. Sunflower Systems supports the Users Group through participation in monthly teleconferences, quarterly web-based education-related updates, product updates and subject matter expertise discussions. We encourage all users of Sunflower Systems to join the Sunflower Systems Users Group in order to keep up-to-date and informed on the latest events. To participate in the Sunflower Systems User Group send your inquiries and feedback to **sunflower-group@lists.llnl.gov**.

EDUCATION AND TRAINING

Education Services a variety of classroom training for entry-level as well as power users, onsite at customers' offices or at our own training locations. Our small, focused sessions get to the details quickly in order to optimize our customer's valuable time and resources. We offer both customized and introductory training solutions that can be deployed to train a large number of users quickly and cost-effectively.

Take advantage of these resources by contacting the Sunflower Systems **Education Services** Group. From the Sunflower System Home Page, click the Services link and from the Services page click the Education Services link to get an overview of the training programs offered at Sunflower Systems. Click the Contact Us link to send a direct message to training@sunflowersystems.com to schedule a training program that meets your organization's specific needs.

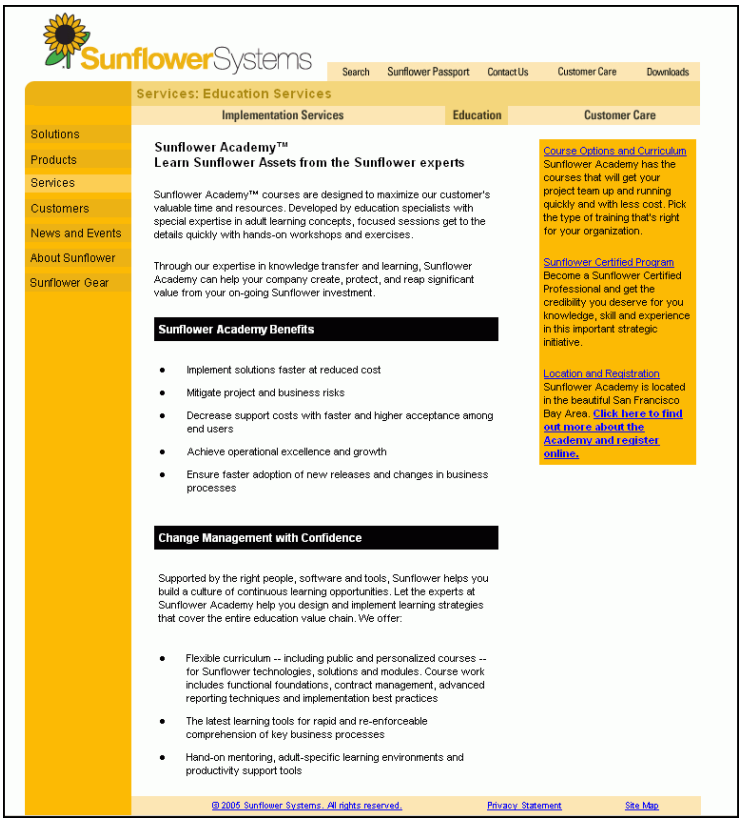


Figure 5-13: Education Services Page

SITE SURVEY AND UPGRADE SUPPORT SERVICES

Sunflower Systems offers comprehensive implementation services to assist enterprises when they make the move to a lifecycle asset management system. Critical factors for success include understanding the current business processes and defining objectives for the new system to ensure that the new lifecycle asset management system meets all of your enterprise's needs including management, finance, IT and your end-users.

More details can be found by clicking the **Services** link on the Sunflower System Home page and then click the **Systems Review** link to receive a comprehensive review that scopes and details the level of effort required to implement a lifecycle asset management system for your organization.

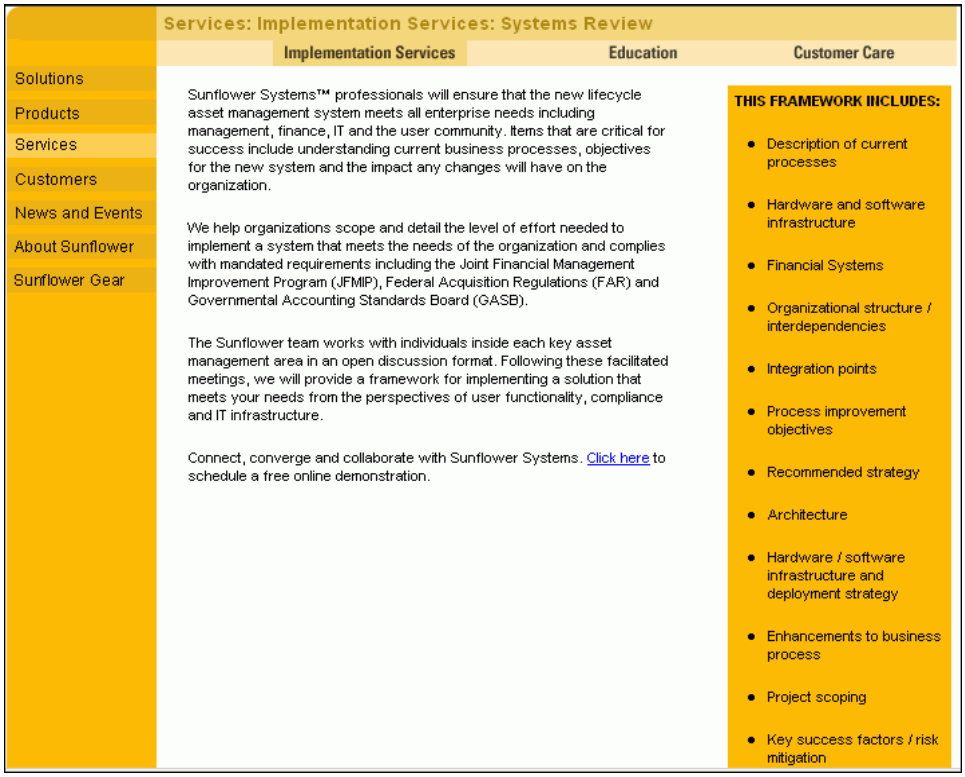


Figure 5-14: Implementation Services Page

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